BidCaster™ User Guide

A Premier Invitation-To-Bid Online Software Service

Revised 12-06-05

Organization of This Guide

Chapter 1, **Introduction**, describes the features, benefits and system requirements of BidCaster™.

Chapter 2, **Getting Started**, covers the BidCaster™ user registration and initial setup procedures.

Chapter 3, **Working with an Address Book (Bid List)**, covers several topics including importing bidder information, editing bidder information, exporting an Address Book, and creating Group Names.

Chapter 4, **Customizing Templates**, introduces users to editing template files, using merge tags etc.

Chapter 5, **Broadcast Steps**, addresses invitation-to-bid steps in detail from start to finish.

Chapter 6, **Broadcast Status Reports**, covers how to view the results of each broadcast, how to create reports, and how to deal with exceptions which may come up during the broadcast.

Appendix A, **Frequently Asked Questions (FAQ)**

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A. Welcome to BidCaster!

This manual covers the installation and operational use of BidCaster. BidCaster™ has been integrated into PlanWell and upgraded with new, powerful features. The objective of this user guide is to provide instructions regarding production use and as a detailed reference. Content Providers will benefit from utilizing the information found here. Updates to this guide (along with other documentation) can be found on ARC and The PEiR Group Intranets. Please note that only those areas of PlanWell that incorporate BidCaster are addressed in this guide. PlanWell user manuals are also located in ARC and The PEiR Group Intranets.

B. New Definitions & Terms

The following new definitions and terms apply:

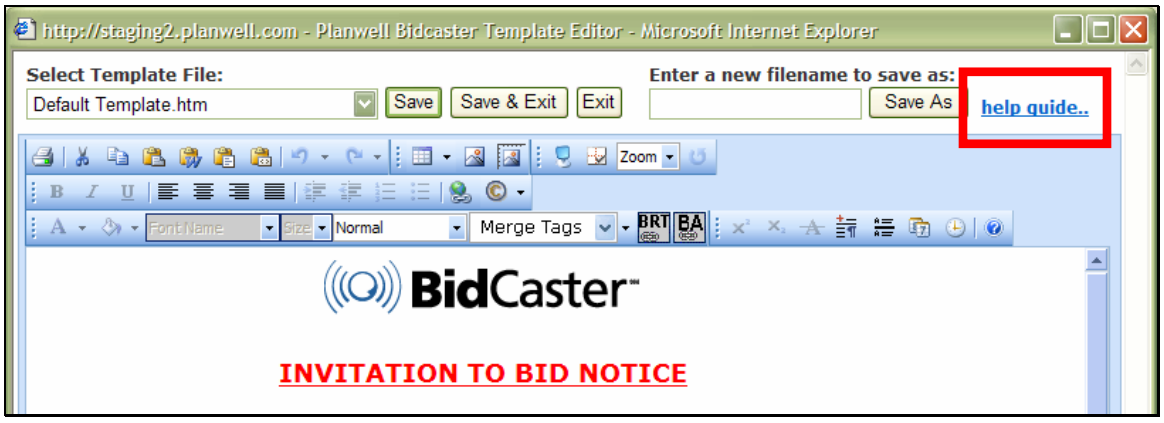
1. "Address Book" was formerly referred to as a "Bidders List". These terms are interchangeable throughout the guide.
2. A "Favorite Bid List" is now called a "Favorite Group". As you recall, this term relates to a pre-defined subset of Bidders derived from an overall Master Bid List/Address Book database.
3. An "RSVP Notice" is now called an "Auto-Reminder Notice".
4. "PlanWell BidCaster Provider" is a reprographer who is licensed and trained to sell and support BidCaster.
5. "Click" specifically refers to a left button click. Whenever a right click is required, the manual will specifically use the term "right click".
6. The term "Select" also refers to "Click".
7. "Pull-down" and "drop-down" menus are synonymous and refer to the same function.

C. Merge Tag Revisions

BidCaster uses the concept of mail merge in all templates (messages) sent to Bidders. The following are revisions to the existing list of merge tags.

1. [Broadcast_Attachments] replaces [Hyperlinked_Download_File]. Use this merge tag when emailing file attachments to recipients.
2. [Project_Address1] and [Project_Address2] replace [Project_Address]. Two project address tags are now provided.
3. [Broadcast_APO] allows a GC to send different print documents to individual Bidders upon receipt of a YES Bid Acknowledgment. This powerful new feature will rapidly become an industry standard.

For a complete listing of merge tags, please view and print the **help guide…** see link located inside the Template Editor program, ref. screen below.



BidCaster is accessed through your local PlanWell BidCaster Provider's web site. Note, your existing username and password to access PlanWell should also provide access to BidCaster. If you don't have a user account established, please contact your chosen PlanWell BidCaster Provider who will be happy to set one up, or simply click on the link **sign up now** which displays on the Provider's web site, ref. next screen.

D. Conventions/Legend/Definitions used in this manual

1. BidCaster™ screen/field names, informational messages appear in **bold**
2. Action items begin with the icon "→".
3. Clickable buttons appear in a **box**.
4. The term selecting an option and highlighting an option are the same.
5. Definitions:
   - i. "Content Providers" refers to firms such as general contractors, owners, developers, public agencies, and construction managers who regularly issue invitations-to-bid (ITBs) to Bidders.
   - ii. "Bidders" simply refers to recipients who receive invitations-to-bid. These are typically Subcontractors and Suppliers, but can be anyone who receives ITBs.
   - iii. Broadcast. Refers to an invitation-to-bid sent to Bidders for a specific purpose, i.e., to issue the original bid set, or addenda 01, 02, etc.

E. PlanWell Technical Support:

For fast resolution of technical questions, please consult with your PlanWell BidCaster Provider. They are the point of contact for all BidCaster™ questions. Normal office hours are between 8am and 5pm, PST – Monday through Friday, excluding major holidays. Phone support is also provided 24/7 by contacting PlanWell® Support @ 510-403-2444 or by email @ support@planwell.com.

Chapter 1- Introduction

A. Overview

BidCaster™ is an integrated ITB (invitation-to-bid) service with PlanWell®, the nation's largest online planroom. It provides an order of magnitude time, cost and risk reducing benefits for owners, developers and, especially general contractors, subs and suppliers.

B. The Integrated ITB with Online Planroom Concept

Primary benefit: Contractors use email to broadcast invitations-to-bid while digitally distributing 100% of plans, specifications and addenda for free viewing by invited Bidders. Bidders submit online Yes or No Bid Acknowledgments which are automatically tracked online. This concept greatly simplifies the traditional time consuming ITB process and leverages the proven capabilities of today's digital reprographers.

C. System Requirements

Content Providers (owners, architects, developers, and general contractors) Need:

- Microsoft Internet Explorer 6.x or Netscape 6.x browser requirement.
- Windows 98, NT, 2000, or XP compliant personal computer.
- Internet connection (56K modem or higher); broadband connection is recommended (DSL, cable modem or higher)
- An ISP internet account
- Bidders (Subcontractors and Suppliers) Need:
- Any standard graphic browser, e.g., Internet Explorer, Netscape or AOL. Note: Not compatible with Macintosh browsers.
- Internet connection (56K modem or higher); broadband connection is recommended (DSL, cable modem or higher)
- Email program which supports HTML (graphics) and is configured to receive HTML email.
- An ISP internet account.

D. Required IE Browser Configuration

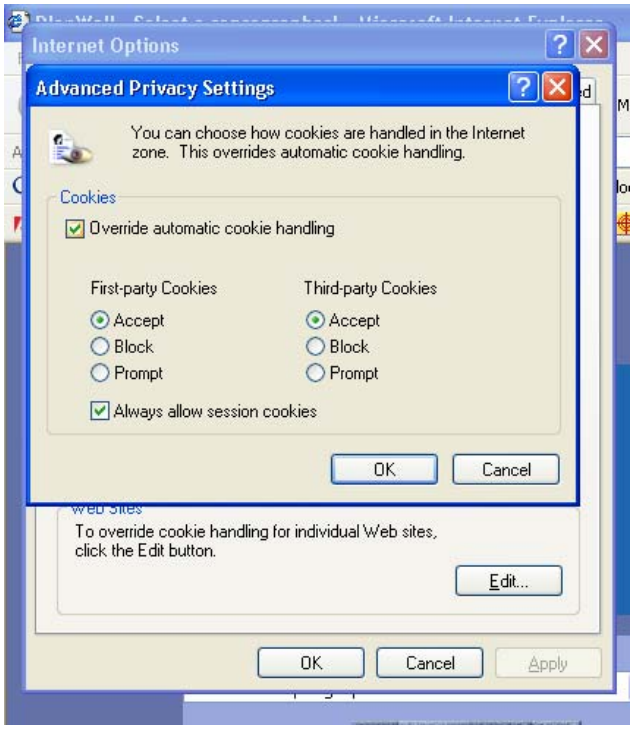
The following browser configuration is required when working with BidCaster or PlanWell. Browsers supported by Planwell include a minimum screen resolution of 1024x768.

→ Open the Internet Explorer window.
→ Click on Tools > Internet Options > In General Tab > Delete cookies… and Delete files….
→ In Security Tab > Click on Custom Level.. > Check for Downloads >File Download should be enable. The Custom settings should be either reset to Medium or Medium Low.
→ Click OK when complete

Figure 1.1

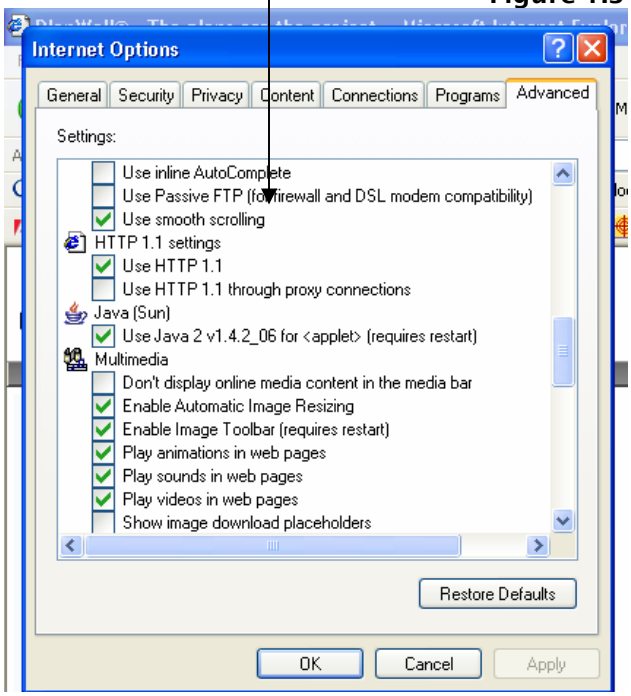
→ Under Privacy Tab> click on Advanced > check for overwrite automatic cookies and always allow session cookies. First party Cookies and Third Party Cookies should be accepted as shown in the Figure 1.2

Figure 1.2



→ Under Advanced tab > check for Java. You need to have Java to view Plans and to upload files in Planwell. You can download it from http://java.com/en/download/help/win_auto.xml#download > Popular Downloads – Java VM.

Figure 1.3



It is also advisable to turn off pop-up blockers in your browser.

(End of Chapter 1)

Chapter 2 - Getting Started

A. Initial Setup process

How do Content Providers (general contractors, owners, developers) get started?

- First, prepare the Content Provider's Address Book (commonly called a Bid List). Note, the Address Book must have CSI code(s) information listed for each company.
- It must have a minimum of data regarding company name, contact first and last name, company address with city, state, country, zip and fax or email number for each company.
- It is advisable that Content Providers obtain a copy of their company logo in digital format (jpg or gif files are acceptable) in order to insert in ITB documents.
- The initial ITB broadcast may be sent by fax reflecting a request for email addresses from all Bidders if your Address Book doesn't already have this data.
- Contact your BidCaster Provider for help during the Setup process…they have the trained staff that can expedite the process.

B. Minimum Setup Requirements Before Launching an ITB Broadcast

The following is required before starting a new invitation-to-bid (ITB) broadcast using BidCaster:

1. **A list of Bidders** uploaded into BidCaster's **Address Book** (commonly called a Bidders List). If you are a previous BidCaster user, your Address Book can be migrated over by referencing **Chapter 3 Working with an Address Book**, paragraph E.3.
2. **ITB Templates** (or Messages) that will be sent to Bidders.
3. **Project Information** needed before each ITB broadcast.

C. New User Registration

New users can register online to access and use the BidCaster™ Invitation to Bid (ITB) service. The prerequisites for using BidCaster™ are:

Be affiliated with a PlanWell® Enterprise licensed reprographer (which operates individual PlanWells® throughout the U.S.), and is a PlanWell PlanWell BidCaster Provider. Note, BidCaster™ is compatible only with PlanWell® Enterprise and not with PlanWell® PDS.

→ To register online, visit www.planwell.com →Find PlanWell Locations Nearest You → Access Licensee website shown. Click on sign up now.

Required registration information is denoted by a red asterisk (*) next to the information requested. Online registration only takes a few minutes and typically is activated within 24 hours. A PlanWell PlanWell BidCaster Provider representative will contact you with your username and password information once established.

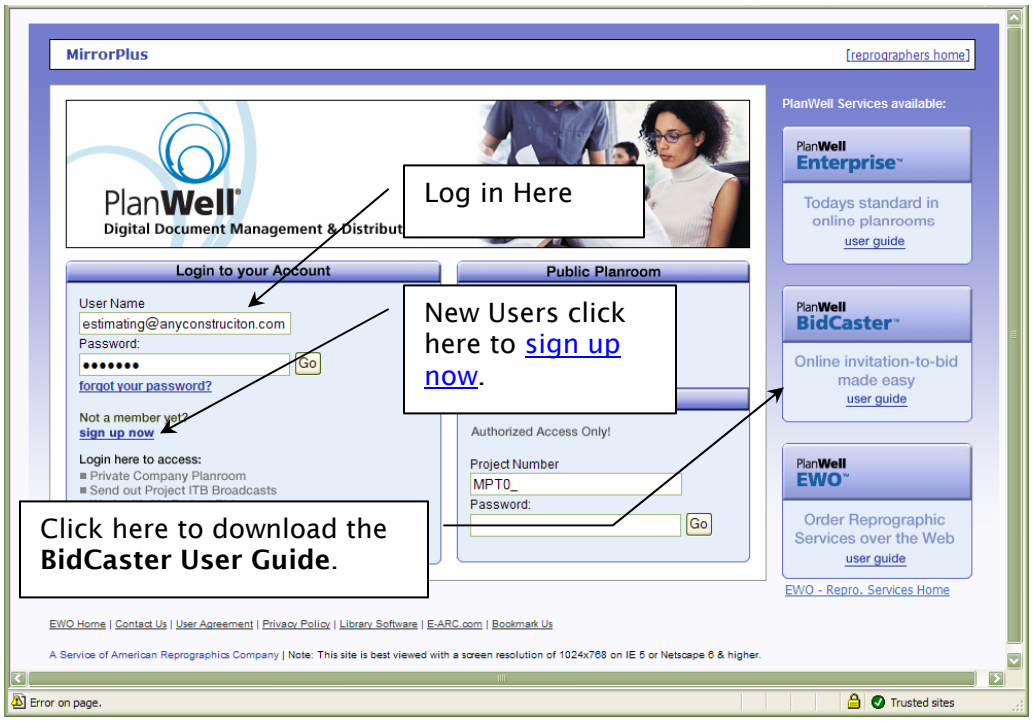
D. Existing BidCaster User Registration

Existing users of the old program will automatically migrate over to the new release effective 12/31/05. This will be accomplished by their local BidCaster™ Provider. Note, this may involve issuance of a new user ID & PW to match that used in PlanWell®.

E. Accessing BidCaster

→ Users can access BidCaster™ at www.planwell.com →Find PlanWell Locations Nearest You → Access Licensee website shown.

A valid user name and password is required before logging on. Login screen to BidCaster™, ref. next screen:

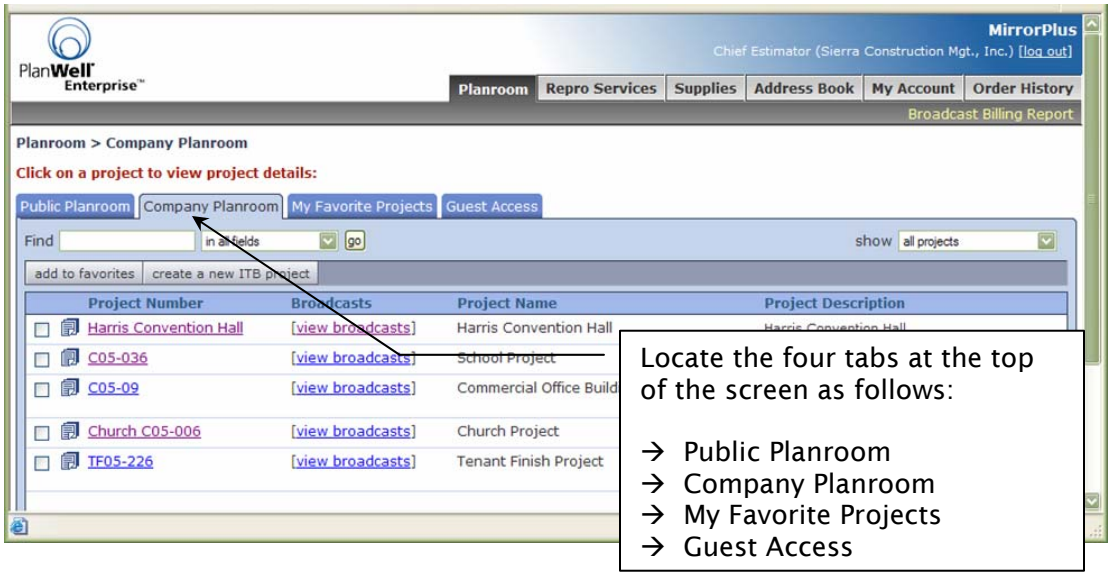

MirrorPlus
[reprographers home]
PlanWell
Digital Document Management & Distribut
Log in Here
Login to your Account
User Name
estimating@anyconstruciton.com
Password:
Go
forgot your password?
Not a member yet?
sign up now
Login here to access:
Private Company Planroom
Send out Project ITB Broadcasts
New Users click here to sign up now.
Public Planroom
Authorized Access Only!
Project Number
MPT0_
Password:
Go
Click here to download the BidCaster User Guide.
PlanWell Services available:
PlanWell Enterprise
Todays standard in online planrooms
user guide
PlanWell BidCaster
Online invitation-to-bid made easy
user guide
PlanWell EWO
Order Reprographic Services over the Web
user guide
EWO - Repro. Services Home
EWO Home | Contact Us | User Agreement | Privacy Policy | Library Software | E-ARC.com | Bookmark Us
A Service of American Reprographics Company | Note: This site is best viewed with a screen resolution of 1024x768 on IE 5 or Netscape 6 & higher.
Error on page.
Trusted sites

→ Click **on the User Guide** to download this and other manuals.

F. PlanWell's Company Planroom

Once logged into BidCaster, you are placed inside your private **Company Planroom** inside PlanWell®, reference the following screen:

Company Planroom screen:



G. BidCaster™ Screen Tabs

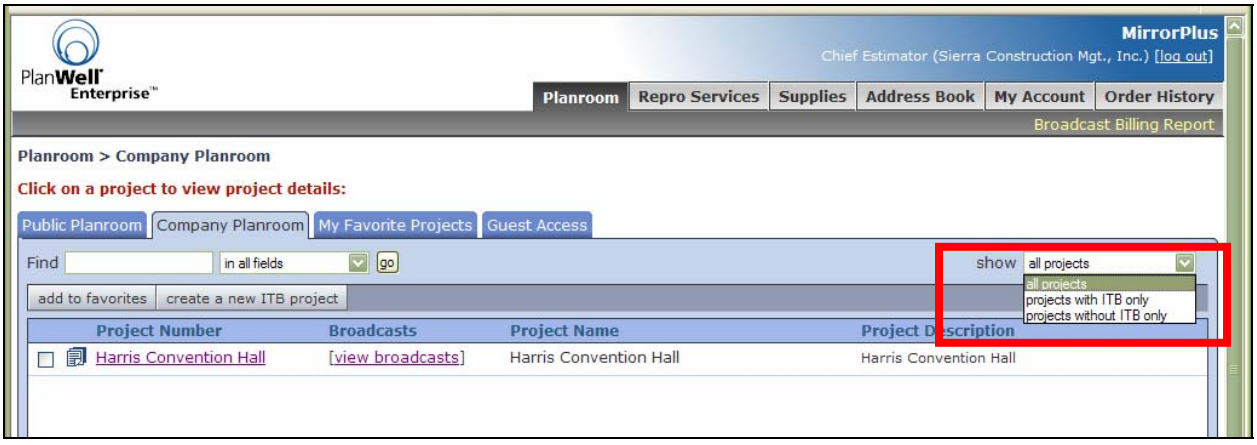
The **Project Summary** screen has 4 tabs which you can select. Use these tabs to navigate between major components of PlanWell® and BidCaster™.

Tab	Description
Public Planroom	To view public projects posted by your local PlanWell Provider. Bidders may access and view projects without the need of a project password.
Company Planroom	To view a list of your own confidential projects (read private). Projects can be added, edited or deleted from this list. This list can reflect old and new projects. Access is provided only by a project password to view such projects.
My Favorite Projects	This list typically reflects those projects you are actively working on during design, bid or construction phases.
Guest Access	This provides access to specific individual projects by entering the project password. This tab is typically used by Bidders.

H. Company Planroom Screen

From this screen, you can:

- Create a new ITB project
- View/edit existing projects
- Show All Projects
- Filter by ITB projects only
- Filter by projects without ITB.
- Add projects to My Favorite Projects (add to favorites), e.g., create a short list of active projects.
- View broadcast (view broadcasts) regarding status information (statistics) for each project.
- Access individual projects via Guest Access.



I. Session Timeout Period

BidCaster won't time-out for 90 minutes. Last, in the event that a time-out does occur, BidCaster will save all broadcast data until a User logs back in.

J. Create a New ITB Project

→ To create a new ITB project, click on **create a new ITB project**.

K. View and Edit a Project

→ To view/edit a project, click on the **Project Number** of the desired project, then enter the project password. Access to the project planroom will then be granted.

L. Show All Projects

→ Use the drop down menu located on the right side of the screen and select show all projects.

M. Filter by ITB projects only.

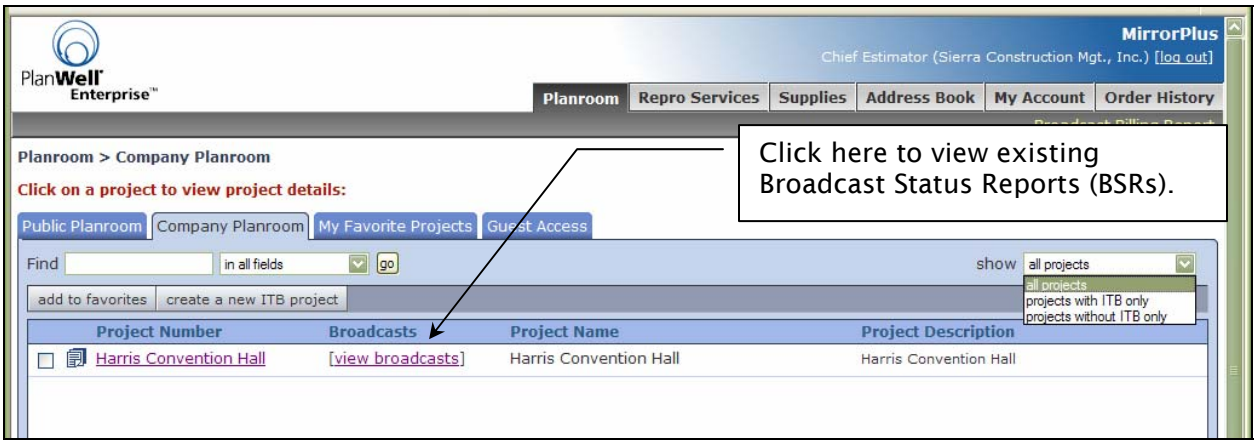
→ Use the drop down menu located on the right side of the screen and select show projects with ITB only.

N. Filter by Projects without ITB

→ Use the drop down menu located on the right side of the screen and select show projects without ITB only.

O. View Broadcast Status Reports

→ **Click on view broadcasts**. Then enter the project password before accessing all Broadcast Status Reports pertaining to a specific project.



(End of Chapter 2)

Chapter 3 - Working with an Address Book (Bid List)

A. Preparing and Importing an Address Book

In order to use BidCaster, an Address Book must first be prepared and uploaded. BidCaster™ uses an Excel file entitled **PlanWell Import Template.xls** for this task.

There are two basic methods to prepare your Address Book before importing:

1. Manually enter all Address Book data into the PlanWell Import Template.
2. Use the Import Wizard to map and import from a contact database, e.g. a third party software program such as Prologue, BidFax, etc.

Many Content Providers (such as general contractors) already have some sort of existing Bid List or Address Book prepared in a digital format such as an excel, word, dbase, text, tab or comma delimited file. Today's software programs typically export to an excel file or to one of these formats. Your local PlanWell BidCaster Provider can help format this data and upload it into BidCaster.

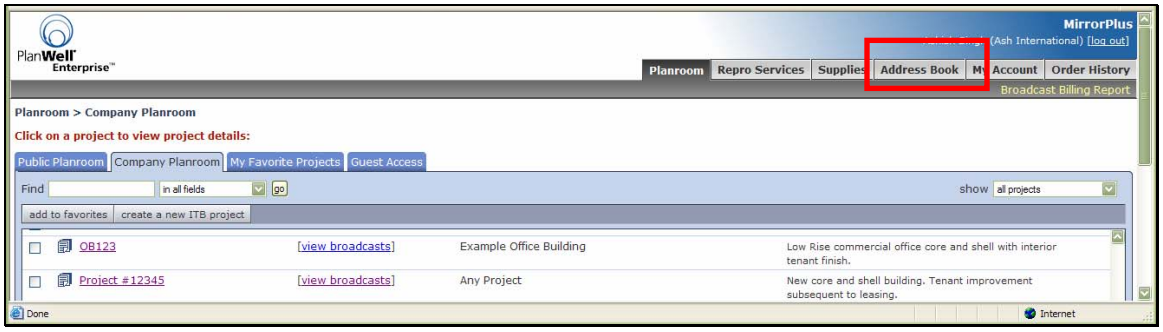
Caution: If preparing an Address Book exported from an existing BidFax database, the data must first be "scrubbed" to promote an error free upload. We have found through experience that BidFax spreadsheets have numerous embedded commands and special formats that need to be stripped out. This is accomplished by importing the BidFax spreadsheet into Microsoft Access, then exporting back to Excel and saving the file. Your PlanWell BidCaster Provider can help with this task if your firm doesn't have use of Microsoft Access. Again, this is a required process only with BidFax.

Caution: When using the PlanWell Import Template.xls, please do not change any descriptions shown anywhere on the spreadsheet. This specifically applies to Worksheet Tab descriptions and column header descriptions. Changing any of these will cause a failure to successfully upload data into BidCaster.

B. Downloading the PlanWell® Import Template

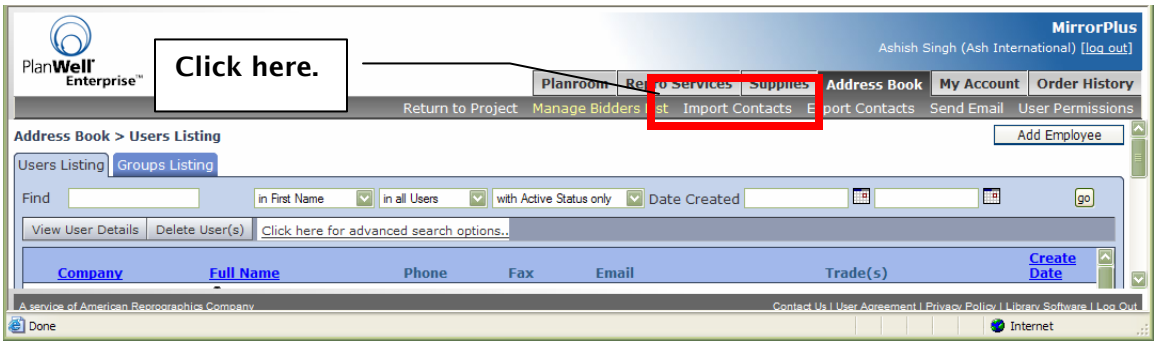
To download the import template,

→ click on the **Address Book** tab



The **Users Listing** screen now displays. Your Address Book is initially empty since no Bidder information has yet been uploaded.

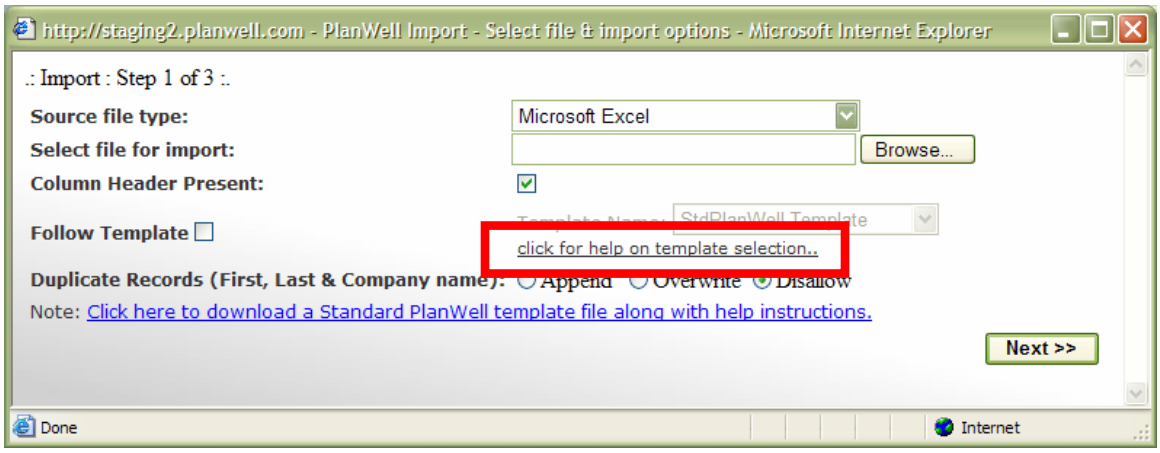
→ Click on **Import Contacts**.



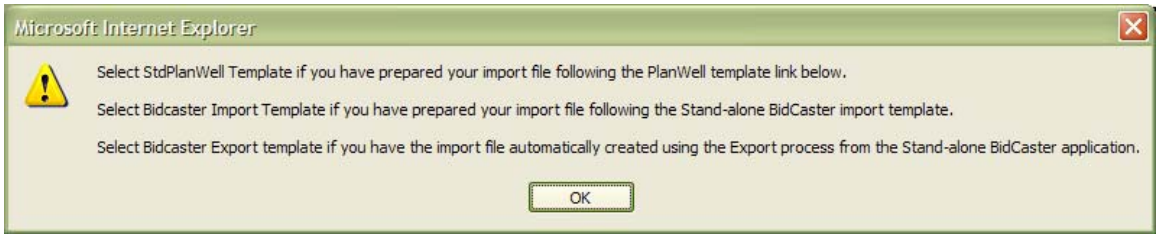
The **PlanWell Import Wizard** appears and displays Step 1 of 3.

→ Select **click for help on template selection..**

This should help you decide on the appropriate import template for your specific situation.


http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
Browse...
Column Header Present:
Follow Template
StdPlanWell Template
click for help on template selection..
Duplicate Records (First, Last & Company name):
Append
Overwrite
Disallow
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Done
Internet

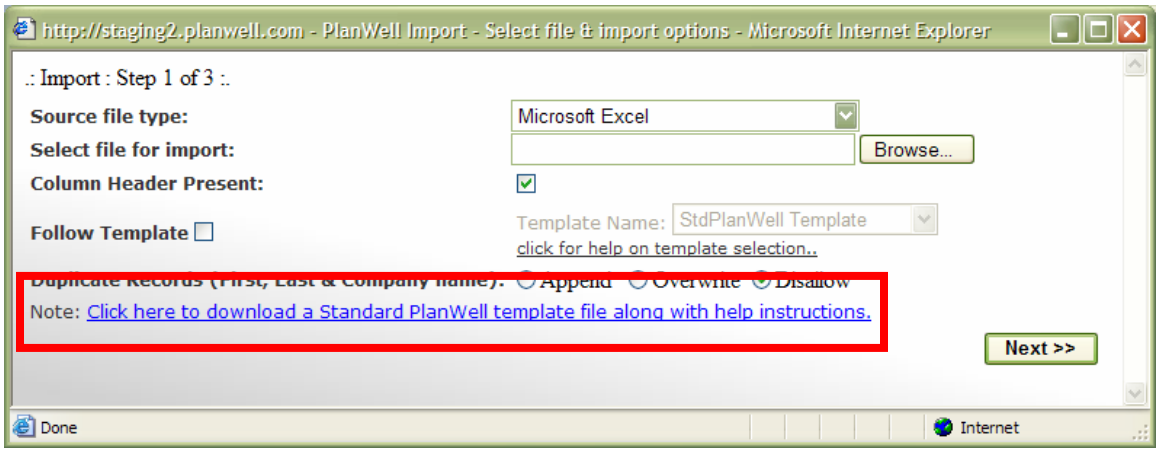
This triggers the following instructions to display:

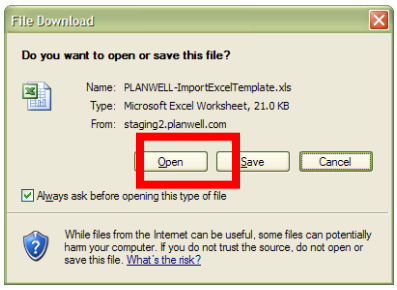

Microsoft Internet Explorer
Select StdPlanWell Template if you have prepared your import file following the PlanWell template link below.
Select Bidcaster Import Template if you have prepared your import file following the Stand-alone BidCaster import template.
Select Bidcaster Export template if you have the import file automatically created using the Export process from the Stand-alone BidCaster application.
OK

Each of the above three import situations are addressed individually below. Please find the one that matches your situation before proceeding.

C. Download Standard PlanWell Template

→ **Select Click here to download a Standard PlanWell template file along with help instructions.**

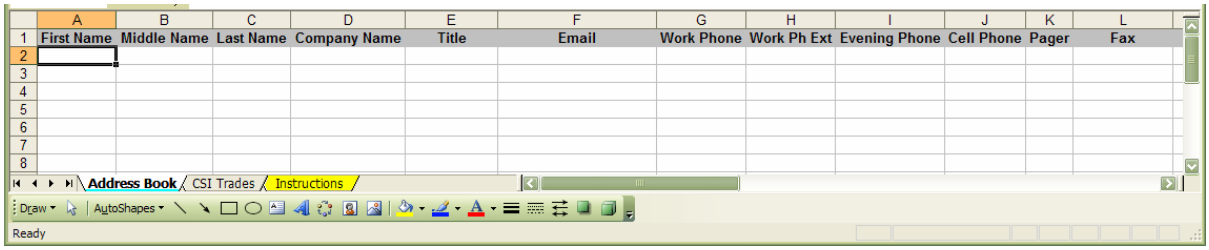

http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
Browse...
Column Header Present:
Follow Template
Template Name:
StdPlanWell Template
click for help on template selection..
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Done
Internet


File Download
Do you want to open or save this file?
Name: PLANWELL-ImportExcelTemplate.xls
Type: Microsoft Excel Worksheet, 21.0 KB
From: staging2.planwell.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

→ **Save** the file to your hard drive

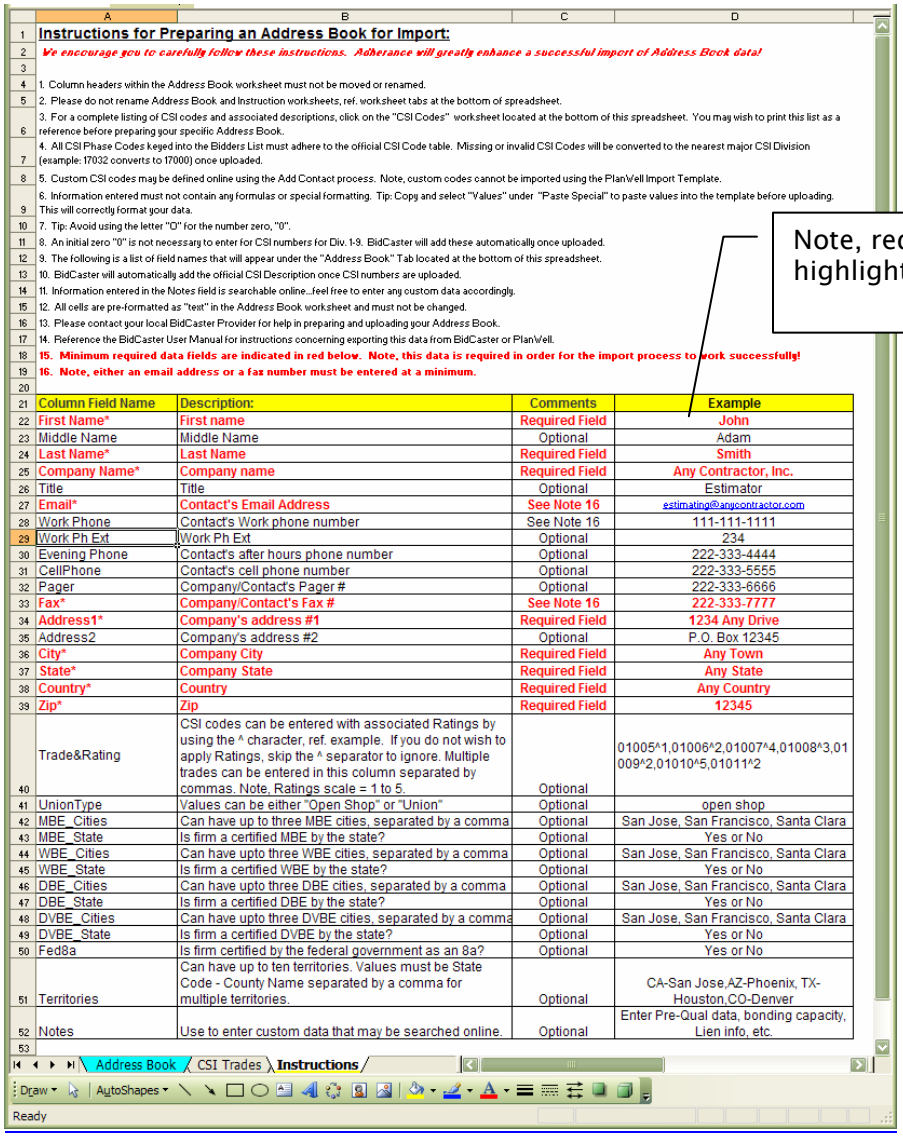
D. Manually Preparing an Address Book using PlanWell Import Template

Open the PlanWell Import Template.xls file and note the following:



There are three colored tabs located at the bottom of the screen.

Click on the yellow colored Instructions tab to read or print out the instructions as shown below. Required fields are indicated in red. Please follow these instructions to enter and format data before importing.



Instructions for Preparing an Address Book for Import:

We encourage you to carefully follow these instructions. Adherance will greatly enhance a successful import of Address Book data!

1. Column headers within the Address Book worksheet must not be moved or renamed.
2. Please do not rename Address Book and Instruction worksheets, ref. worksheet tabs at the bottom of spreadsheet.
3. For a complete listing of CSI codes and associated descriptions, click on the "CSI Codes" worksheet located at the bottom of this spreadsheet. You may wish to print this list as a reference before preparing your specific Address Book.
4. All CSI Phase Codes keyed into the Bidders List must adhere to the official CSI Code table. Missing or invalid CSI Codes will be converted to the nearest major CSI Division (example: 17032 converts to 17000) once uploaded.
5. Custom CSI codes may be defined online using the Add Contact process. Note, custom codes cannot be imported using the PlanWell Import Template.
6. Information entered must not contain any formulas or special formatting. Tip: Copy and select "Values" under "Paste Special" to paste values into the template before uploading. This will correctly format your data.
7. Tip: Avoid using the letter "O" for the number zero, "0".
8. An initial zero "0" is not necessary to enter for CSI numbers for Div. 1-9. BidCaster will add these automatically once uploaded.
9. The following is a list of field names that will appear under the "Address Book" Tab located at the bottom of this spreadsheet.
10. BidCaster will automatically add the official CSI Description once CSI numbers are uploaded.
11. Information entered in the Notes field is searchable online...feel free to enter any custom data accordingly.
12. All cells are pre-formatted as "text" in the Address Book worksheet and must not be changed.
13. Please contact your local BidCaster Provider for help in preparing and uploading your Address Book.
14. Reference the BidCaster User Manual for instructions concerning exporting this data from BidCaster or PlanWell.
15. **Minimum required data fields are indicated in red below. Note, this data is required in order for the import process to work successfully!**
16. **Note, either an email address or a fax number must be entered at a minimum.**

Column Field Name	Description:	Comments	Example
First Name*	First name	Required Field	John
Middle Name	Middle Name	Optional	Adam
Last Name*	Last Name	Required Field	Smith
Company Name*	Company name	Required Field	Any Contractor, Inc.
Title	Title	Optional	Estimator
Email*	Contact's Email Address	See Note 16	estimating@anycontractor.com
Work Phone	Contact's Work phone number	See Note 16	111-111-1111
Work Ph Ext	Work Ph Ext	Optional	234
Evening Phone	Contact's after hours phone number	Optional	222-333-4444
CellPhone	Contact's cell phone number	Optional	222-333-5555
Pager	Company/Contact's Pager #	Optional	222-333-6666
Fax*	Company/Contact's Fax #	See Note 16	222-333-7777
Address1*	Company's address #1	Required Field	1234 Any Drive
Address2	Company's address #2	Optional	P.O. Box 12345
City*	Company City	Required Field	Any Town
State*	Company State	Required Field	Any State
Country*	Country	Required Field	Any Country
Zip*	Zip	Required Field	12345
Trade&Rating	CSI codes can be entered with associated Ratings by using the ^ character, ref. example. If you do not wish to apply Ratings, skip the ^ separator to ignore. Multiple trades can be entered in this column separated by commas. Note, Ratings scale = 1 to 5.	Optional	01005^1,01006^2,01007^4,01008^3,01009^2,01010^5,01011^2
UnionType	Values can be either "Open Shop" or "Union"	Optional	open shop
MBE_Cities	Can have up to three MBE cities, separated by a comma	Optional	San Jose, San Francisco, Santa Clara
MBE_State	Is firm a certified MBE by the state?	Optional	Yes or No
WBE_Cities	Can have upto three WBE cities, separated by a comma	Optional	San Jose, San Francisco, Santa Clara
WBE_State	Is firm a certified WBE by the state?	Optional	Yes or No
DBE_Cities	Can have upto three DBE cities, separated by a comma	Optional	San Jose, San Francisco, Santa Clara
DBE_State	Is firm a certified DBE by the state?	Optional	Yes or No
DVBE_Cities	Can have upto three DVBE cities, separated by a comma	Optional	San Jose, San Francisco, Santa Clara
DVBE_State	Is firm a certified DVBE by the state?	Optional	Yes or No
Fed8a	Is firm certified by the federal government as an 8a?	Optional	Yes or No
Territories	Can have up to ten territories. Values must be State Code - County Name separated by a comma for multiple territories.	Optional	CA-San Jose,AZ-Phoenix, TX-Houston,CO-Denver
Notes	Use to enter custom data that may be searched online.	Optional	Enter Pre-Qual data, bonding capacity, Lien info, etc.

Address Book | CSI Trades | Instructions

Draw | AutoShapes

Ready

Note, required data is highlighted in red.

As you see, there are 3 separate spreadsheets denoted by tabs at the bottom of the spreadsheet:

- **Address Book** spreadsheet/tab – click on this tab to view the format for BidCaster™ data. Actual sub-supplier data will be loaded into this spreadsheet. This format must be maintained and tab names must never be changed!

- **CSI Codes** spreadsheet/tab – click on this tab to view the regulation CSI codes and descriptions.

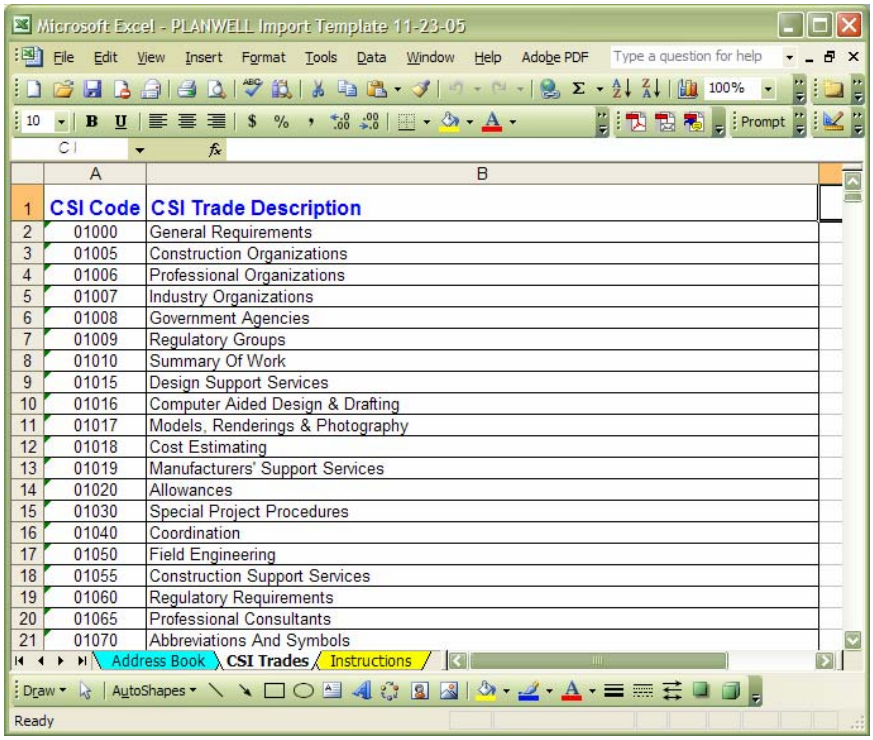
- **Instructions** spreadsheet/tab – click on this tab to view the instructions for using the import template. The instructions list which fields are required by BidCaster. As a general rule, if any required fields are missing, that record will not be imported into BidCaster.

Caution: Under no circumstances should header or tab information be deleted, renamed, or moved to a different column. Data must be entered exactly as shown.

→ Now select the tab labeled **CSI Codes** at the bottom of the screen.

The following screen will appear. The CSI codes listed must be used before uploading your bid list into BidCaster. They reflect a blend of the 1988 and 1995 official CSI phase codes with 1,680 total codes available from which to select. While Users cannot upload custom CSI codes using the import template process, they may add them online.

Codes that do not match this list will still be uploaded, but changed to reflect only the major CSI category. Example: 09123 → 09000. Note: Once uploaded though, you may then change to an official code number once online within BidCaster™ using the Bidder List tab.



	A	B
1	CSI Code	CSI Trade Description
2	01000	General Requirements
3	01005	Construction Organizations
4	01006	Professional Organizations
5	01007	Industry Organizations
6	01008	Government Agencies
7	01009	Regulatory Groups
8	01010	Summary Of Work
9	01015	Design Support Services
10	01016	Computer Aided Design & Drafting
11	01017	Models, Renderings & Photography
12	01018	Cost Estimating
13	01019	Manufacturers' Support Services
14	01020	Allowances
15	01030	Special Project Procedures
16	01040	Coordination
17	01050	Field Engineering
18	01055	Construction Support Services
19	01060	Regulatory Requirements
20	01065	Professional Consultants
21	01070	Abbreviations And Symbols

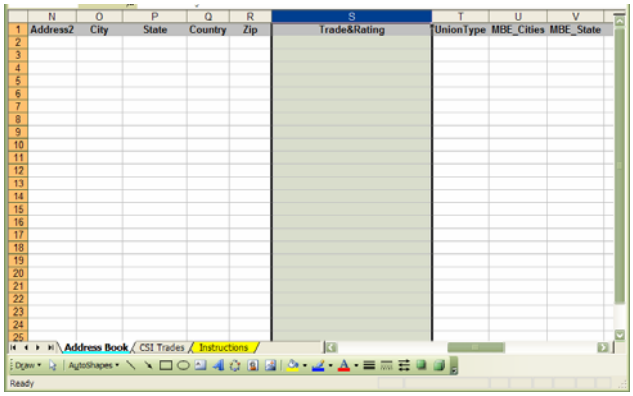
We recommend copying and pasting codes into the CSI Phase column since they are pre-formatted in "text" format with required leading zeros for divisions 1 through 9. Example → 07100 or 09200.

Caution #1: Make sure you do not inadvertently use the letter "O" to represent the number zero, "0"…or the letter "l" to represent the number "1". Doing so will trigger an error and prevent the company associated from being successfully uploaded.

Caution #2: if you do not cut and paste from this screen, you must first format the CSI Phase column cells within the **Address Book** *tab to accept "text" numbers. Numeric data must be imported into the BidCaster™ template as text only otherwise leading zeros will be truncated.*

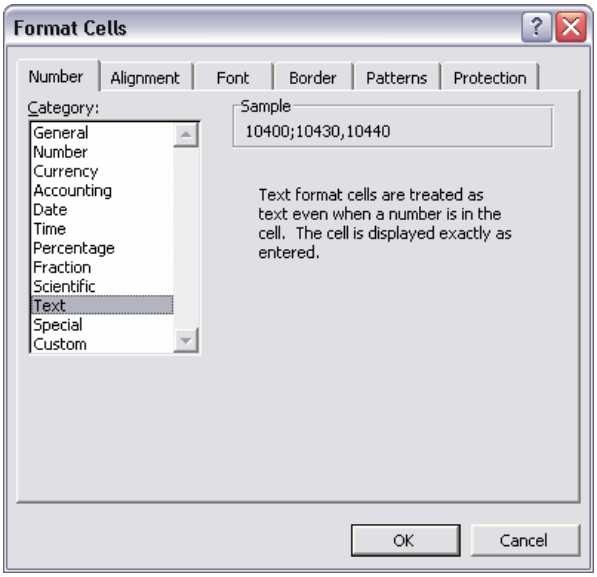
To format correctly, please do the following:

→ Select the range of cells to format.



→ Select "Cells" within "Format", ref. the command bar at the top of the screen.

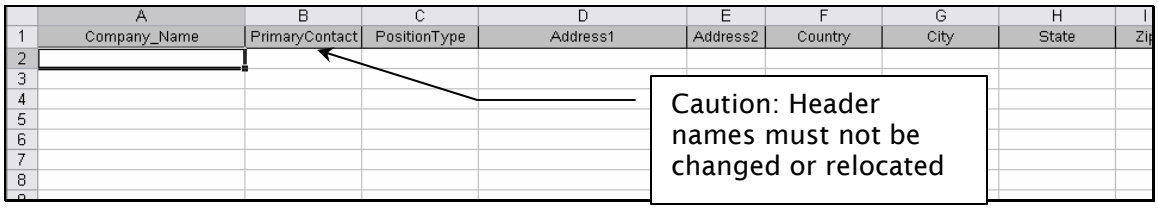
→ Select "Text" and click the **OK** button.



→ You may now enter leading zeros for all codes as required.

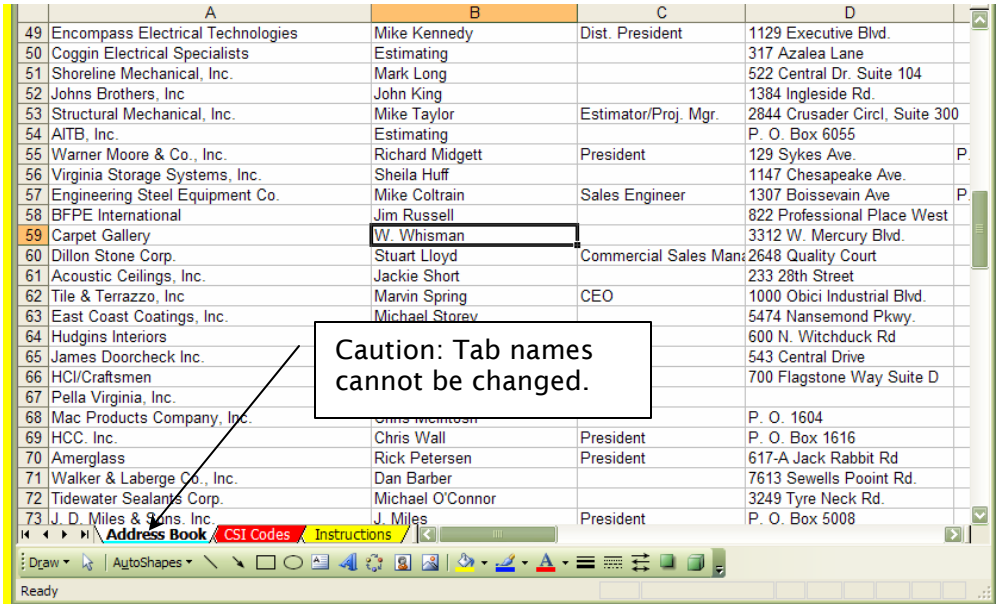
Now select the turquoise colored tab labeled **Address Book**. Shown below is the screen that appears listing various types of data with column headers as follows:

Company Name	Phone
Primary Contact	Cell Phone
Position Type	Fax
Address 1	Email Address
Address 2	Website Address
Country	Notes (Custom)
City	CSI Phase & Rating
State	Territory
Zip	Minority



Caution: Again, header name and column cannot be moved or changed in any fashion.

Once complete, the data should appear similar to that shown as follows:



Note that each row represents an individual company. The same company can be entered numerous times on separate rows using different contact names and CSI phase codes. Or the company can be entered once with a single contact name, but with multiple CSI codes. Either way is acceptable. In this manner, you may upload a maximum of 10,000 rows of company information.

For example, if a sub-supplier has 10 CSI codes, the Bidder database will have 10 records. For companies with multiple CSI codes, the format for entering this information into the BidCaster™ template is as follows. In the **CSI_Number** column, separate each 5-digit CSI code with a comma, i.e.,

01000,08000,12000,16000,13000,06200,08400,16220,12491,13160

Fields such as fax and phone numbers must follow the convention of (###) ###-####. Any use of formulas to create this format will only cause the BidCaster™ import to fail.

A maximum of 25 CSI codes can be accepted for each record import. For sub-suppliers with more than 25 CSI codes, duplicate the company record twice and list all CSI codes between both records.

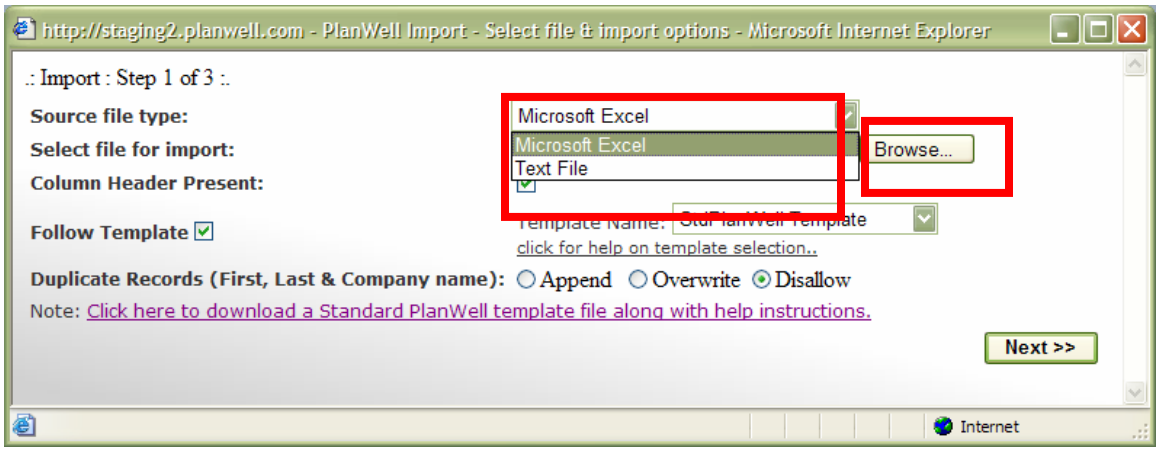
Note: A maximum of 10,000 rows of company data can be uploaded per User.

E. Using the Import Wizard

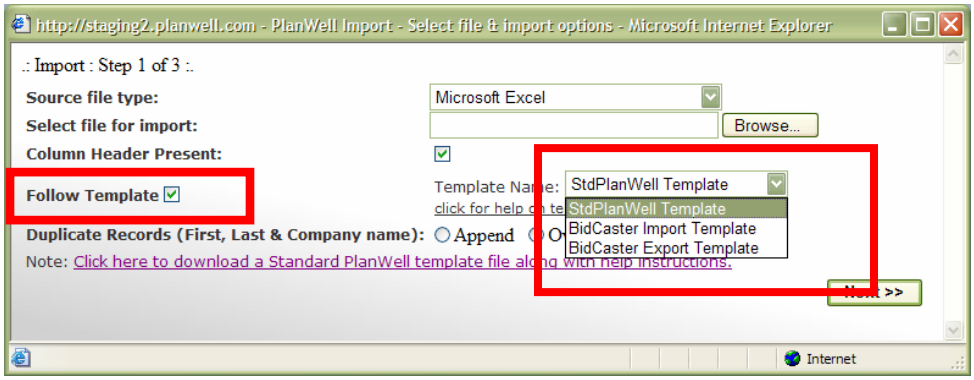
1. Import Using a Std PlanWell Template

Once all data is entered, verified and saved, proceed with the import wizard process as follows:

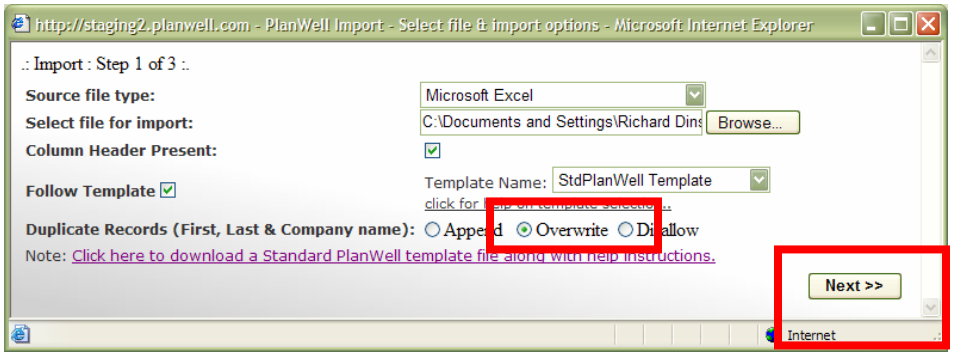
- → Select the type of file to be imported, Excel or comma delimited text.
- → **Browse** for the file inside your hard drive.


http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
Microsoft Excel
Text File
Browse...
Column Header Present:
Follow Template
click for help on template selection..
Duplicate Records (First, Last & Company name): Append Overwrite Disallow
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Internet

- → Check on Follow Template
- → Set Template Name as StdPlanWell Template


http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
Browse...
Column Header Present:
Follow Template
Template Name:
StdPlanWell Template
StdPlanWell Template
BidCaster Import Template
BidCaster Export Template
Duplicate Records (First, Last & Company name): Append
Note: Click here to download a Standard PlanWell template file along with help instructions.
Internet

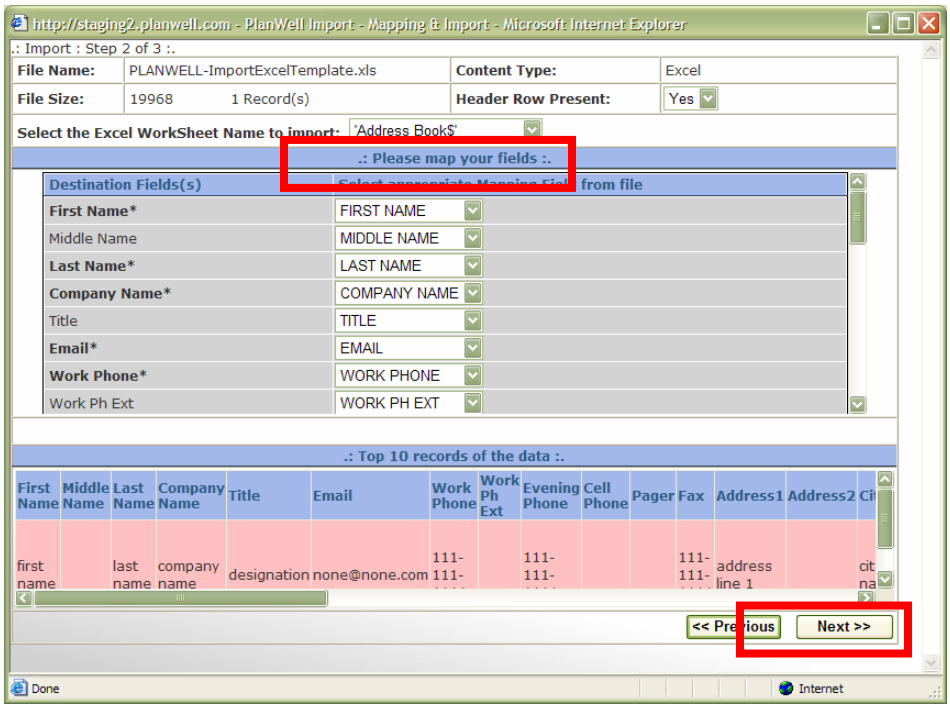
- → Set Duplicate Records (First, Last & Company Name): to Overwrite
- → Click Next >>

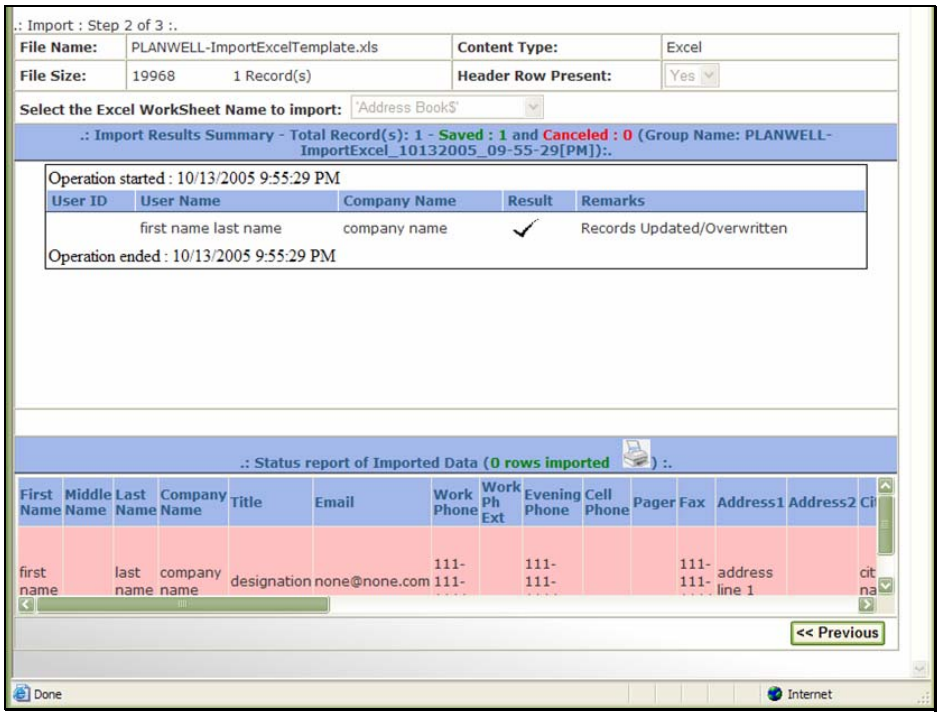

http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
C:\Documents and Settings\Richard Din
Browse...
Column Header Present:
Follow Template
Template Name:
StdPlanWell Template
Duplicate Records (First, Last & Company name):
Overwrite
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Internet

→ Set the **Excel Worksheet Name** to Import is set to **Address Book.**

The import wizard will automatically map all data to the necessary fields.

→ Click on **Next >>**

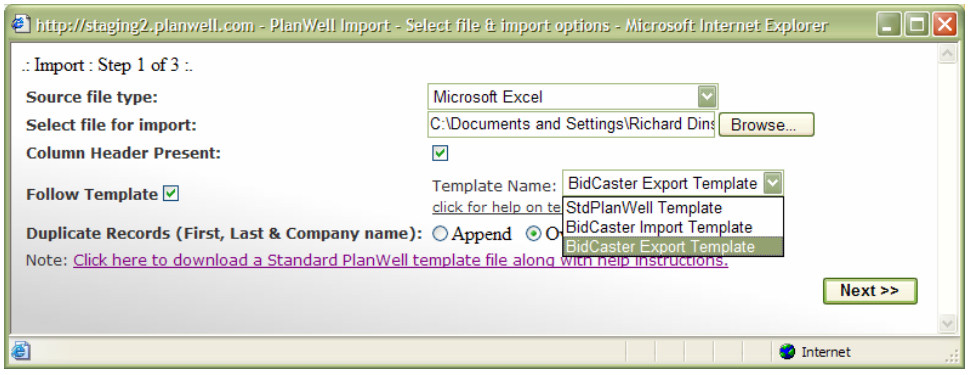




2. **Import using a BidCaster Export(ed) Template (the old BidCaster program uses this template when exporting data)**

   We recommend this process to all existing BidCaster Users versus using a BidCaster Import Template. The reason is because there is slightly more data exported e.g., minority information and territory information.

   - → Log in to the previous BidCaster program.
   - → Access My Files within the My Account tab.
   - → Under Export Bidder List, set Select Bidder List or Favorite to: Entire Bidder List.
   - → Click on **Export to Excel File.**


http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
C:\Documents and Settings\Richard Dins
Browse...
Column Header Present:
Follow Template
Template Name:
BidCaster Export Template
click for help on te
StdPlanWell Template
BidCaster Import Template
BidCaster Export Template
Duplicate Records (First, Last & Company name):
Append
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Internet

Once exported, you will be prompted to save the file to your hard drive.

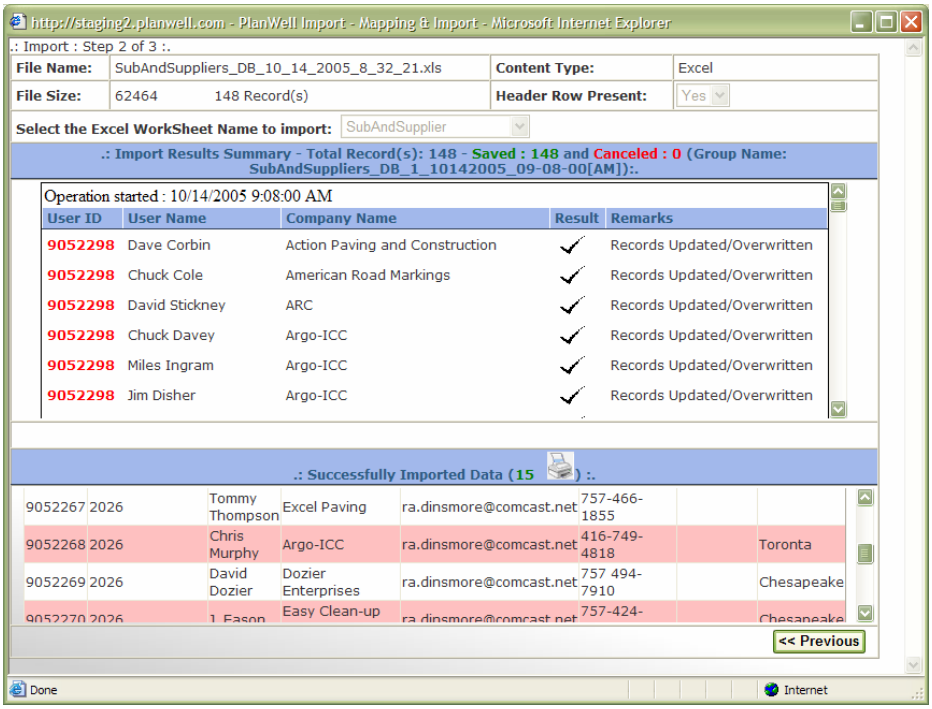
Note, the file will be automatically zipped and must be un-zipped before importing.

Proceed with the **Import Wizard** to begin the import process.

→ Follow the same process as before, but this time, select **BidCaster Export Template**.
→ Under **Duplicate Records**, select **Overwrite**.
→ Click on **Next >>** to proceed to **Step 2**.

Similarly, follow Steps 2 and 3 of the Import Wizard to successfully import the BidCaster **Export Template** into the new integrated BidCaster**.**

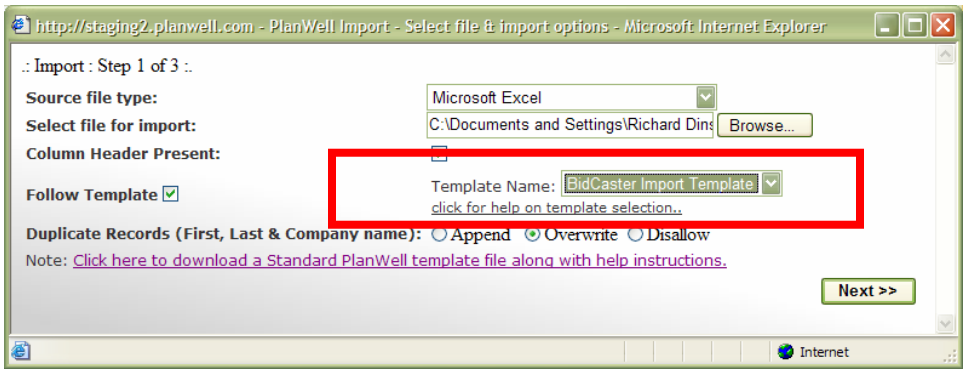
Once imported, the screen should appear similar to the following:


http://staging2.planwell.com - PlanWell Import - Mapping & Import - Microsoft Internet Explorer
.: Import : Step 2 of 3 :.
File Name: SubAndSuppliers_DB_10_14_2005_8_32_21.xls
Content Type: Excel
File Size: 62464 148 Record(s)
Header Row Present: Yes
Select the Excel WorkSheet Name to import: SubAndSupplier
.: Import Results Summary - Total Record(s): 148 - Saved : 148 and Canceled : 0 (Group Name: SubAndSuppliers_DB_1_10142005_09-08-00[AM]):.
Operation started : 10/14/2005 9:08:00 AM
User ID | User Name | Company Name | Result | Remarks
9052298 Dave Corbin Action Paving and Construction Records Updated/Overwritten
9052298 Chuck Cole American Road Markings Records Updated/Overwritten
9052298 David Stickney ARC Records Updated/Overwritten
9052298 Chuck Davey Argo-ICC Records Updated/Overwritten
9052298 Miles Ingram Argo-ICC Records Updated/Overwritten
9052298 Jim Disher Argo-ICC Records Updated/Overwritten
.: Successfully Imported Data (15) :.
9052267 2026 Tommy Thompson Excel Paving ra.dinsmore@comcast.net 757-466-1855
9052268 2026 Chris Murphy Argo-ICC ra.dinsmore@comcast.net 416-749-4818 Toronta
9052269 2026 David Dozier Dozier Enterprises ra.dinsmore@comcast.net 757 494-7910 Chesapeake
9052270 2026 J. Eason Easy Clean-up ra.dinsmore@comcast.net 757-424- Chesapeake
<< Previous
Done
Internet

Note, some records are overwritten in order to prevent duplicates within the database. In this example, of the 148 records imported, only 15 were new records added to the Address Book. The remainder are those which over-wrote existing records.

3. Import using a BidCaster Import Template

This process is reserved for existing BidCaster users who wish to migrate their existing Address Book data which was modeled using the old BidCaster Import Template. The process is identical to that for a **BidCaster Export Template** with the exception that **Follow Template** is set to **BidCaster Import Template**, ref. screen below:


http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
C:\Documents and Settings\Richard Dins
Browse...
Column Header Present:
Follow Template
Template Name:
BidCaster Import Template
click for help on template selection..
Duplicate Records (First, Last & Company name):
Append
Overwrite
Disallow
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Internet

4. **Import from a Third Party Address Book**
   As discussed, many third party software programs typically export Address Book data to an excel file, but initially, it will not formatted correctly, ref. example below:

	A	B	C	D	E	
1	FirstName	LastName	Company	JobTitle	BusinessStreet	BusinessC
2	David	Twerdokus	Signage Industries Corp.	Sales Representative	P. O. Box 4879	Archdale
3			Chesapeake Bay Corporation		218 Dominion Blvd.IIP. O. Box 1040	Chesapeal
4	Mark	Chambers	JANMAR Door Controls & Glass		2464 Pleasurehouse Rd	Virginia Be
5	Matthew	Epley	Thompson's Grading Co., Inc.		1581 General Booth Blvd. Suite 107	Virginia Be
6	Bill	Grainger	Cast Stone, Inc.		Bowland Parkway	Virginia Be
7	Alan	Hart	George W. Jones Co.	Estimator	6752 Walmsley Blvd.	Richmond
8	Grayson	Bradshaw	Commercial Ready Mix, Inc.		1275 Portsmouth Blvd.	Suffolk
9	Steve	Tilley	Greenbrier Farms Landscaping Of VA, Inc.	Project Manager	3720 Profit Way	Chesapeal
10	Ray	Norwig	J. M. Briggs, Inc.		1208 Cradle Rd	Virginia Be
11	John	Volkmer	Foster Fire Protection Services, Inc.		1244A Executive Blvd. Suite 105	Chesapeal
12	William	Bailey	Patton, Harris, Rust & Assoc.	Survey Coordinator	195 Rosemont Rd.	Virginia Be
13	Brian	Santore	Synergy			
14	Meade	Welsh	Waterfront Marine Construction, Inc.	Project Manager	2809 Crusder Circle	Virginia Be
15	Woody	Smith	Ford Pile Foundations	Estimator	P. O. Box 62364IIVirginia Beach, VA 23466-2364II4985 Euclid Rd	Virginia Be
16	Henry	Smith	Shoreline Industries			Portsmouth
17	Mike	Watts	Norfolk Sash & Door Co., Inc.		1301 Production Rd	Norfolk
18	Eddie	Lester	Greenville Contractors, Inc.	Estimator	P. O. Box 423IIGreenville, NC 27835II1214 Mumford Rd	Greenville
19	Mery	Goforth	Arrow Exterminators, Inc.	President	715 Battleground AveIIP. O. Box 4194	Greensbor
20	Liz	Timmons	National Specialties Co.		P. O. Box 7484	Columbia
21	Tony	Donovan	Mid-Atlantic Glass Corp.		805 Live Oak Drive	Chesapeal
22	Jeff	Gay	Pitt Electric Inc.			

Perhaps the most valuable part of the **Import Wizard** is its ability to import data from an unknown third party Address Book. This is done by allowing custom mapping of data to fit into a **PlanWell Import Template**. This process is accomplished as follows. For training purposes, we'll assume the data is available as an Excel spreadsheet vs. Text file.

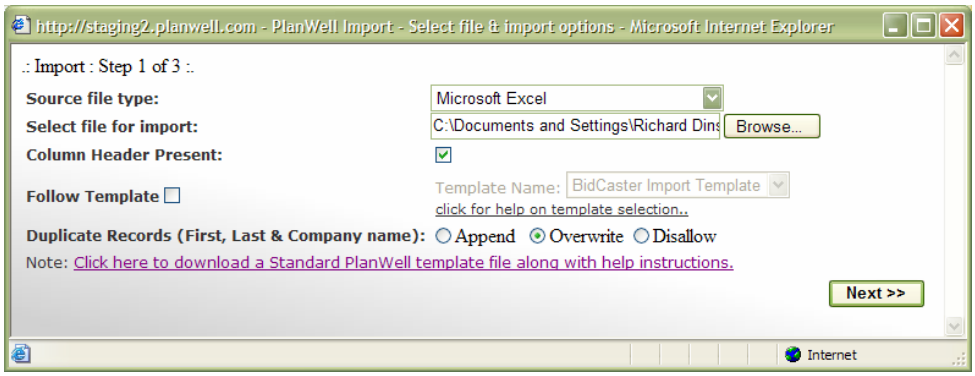
→ **Browse** to locate and **Open** the third party file.

Verify that header information is available. If it is not, please add header titles to match that of the **PlanWell Import Template** with same spelling.

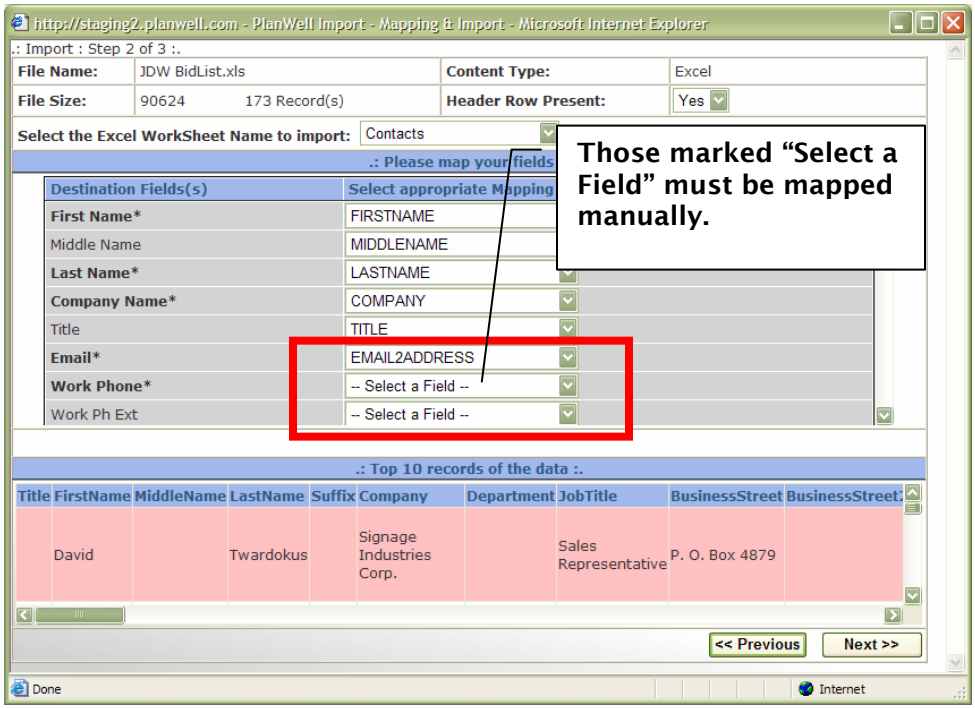
→ After complete, check on the **Column Header Present** box.

Since we are not following a pre-defined template, **Follow Template** is purposely checked off.

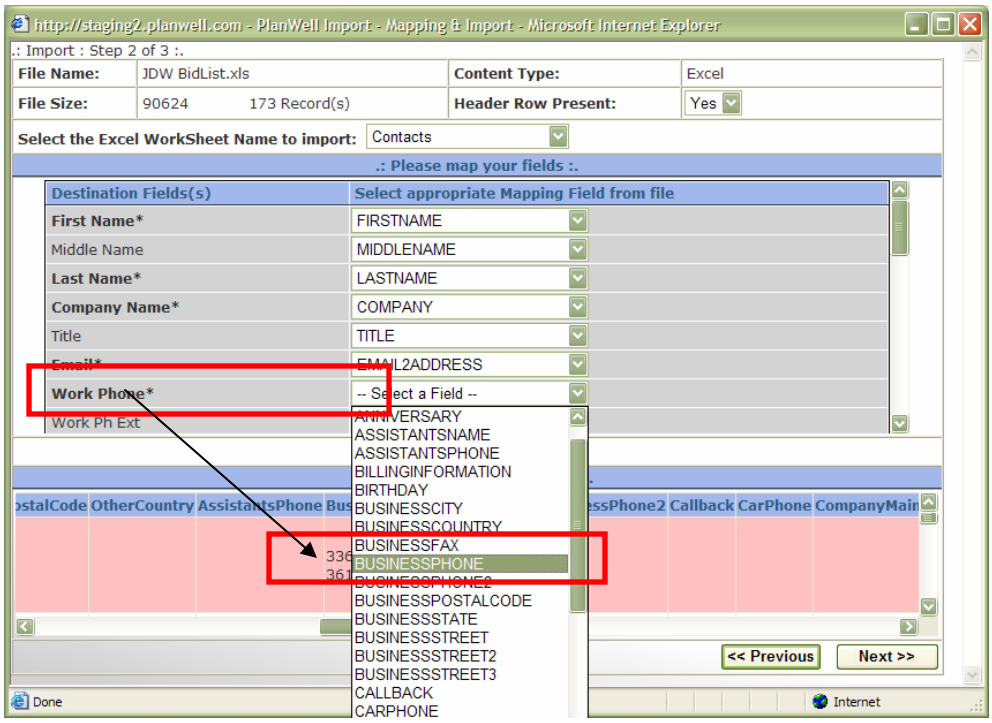
→ Set **Duplicate Records** to **Overwrite** (this avoids duplicates).
→ Click **Next** >> for Step 2.


http://staging2.planwell.com - PlanWell Import - Select file & import options - Microsoft Internet Explorer
.: Import : Step 1 of 3 :.
Source file type:
Microsoft Excel
Select file for import:
C:\Documents and Settings\Richard Din
Browse...
Column Header Present:
Follow Template
Template Name:
BidCaster Import Template
click for help on template selection..
Duplicate Records (First, Last & Company name):
Append
Overwrite
Disallow
Note: Click here to download a Standard PlanWell template file along with help instructions.
Next >>
Internet

Note, the program will automatically check header information and attempt to make the right mapping decision. Users must correctly verify such matches and where the screen displays "Select a Field", Users must manually determine the correct mapping of the associated data. This example is based on an old BidFax database which was exported to a spreadsheet. Note, whatever appropriate data cannot be mapped, it must be entered manually.



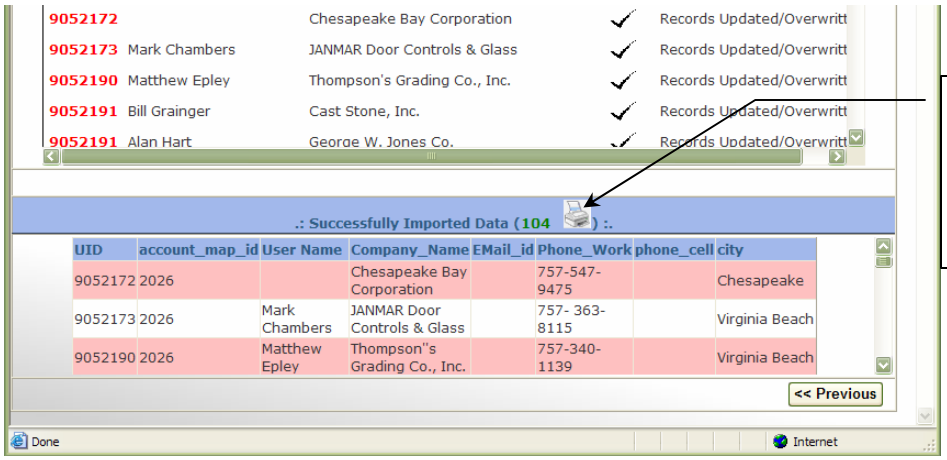
For example, in the following screen, "Work Phone" is mapped to "BusinessPhone" using the drop down menu process displayed. This mapping process is repeated until all appropriate (important) "Select a Field" data is mapped. Note that "Work Ph Ext" is not available from the third party database, so it will remain un-mapped since it is relatively un-important or required information to import. Remember that all asterisked (*) data fields shown are mandatory. If the data doesn't exist in the third party database, it must be entered before importing.



Once all data is mapped,

→ Click **Next** >> to proceed to **Step 3**

Depending on the size of the database being uploaded, the import process may take a number of minutes to upload and process the data. Once it completes, the screen appears as shown on the next screen. You may then click on the printer icon to print out a report of the imported information. In this example, 173 Bidder firms were successfully uploaded. Time to upload was less than 60 seconds using a high speed cable modem.


9052172 Chesapeake Bay Corporation Records Updated/Overwritt
9052173 Mark Chambers JANMAR Door Controls & Glass Records Updated/Overwritt
9052190 Matthew Epley Thompson's Grading Co., Inc. Records Updated/Overwritt
9052191 Bill Grainger Cast Stone, Inc. Records Updated/Overwritt
9052191 Alan Hart George W. Jones Co. Records Updated/Overwritt
.: Successfully Imported Data (104) :.
UID account_map_id User Name Company_Name EMail_id Phone_Work phone_cell city
9052172 2026 Chesapeake Bay Corporation 757-547-9475 Chesapeake
9052173 2026 Mark Chambers JANMAR Door Controls & Glass 757- 363-8115 Virginia Beach
9052190 2026 Matthew Epley Thompson"s Grading Co., Inc. 757-340-1139 Virginia Beach
<< Previous
Done
Internet

Click here to print the **Import Data Report**

Depending on the size of the import, this may take several minutes. Once the import has completed, an **Import Results Summary** is displayed with information relating to records which were or were not successfully loaded.

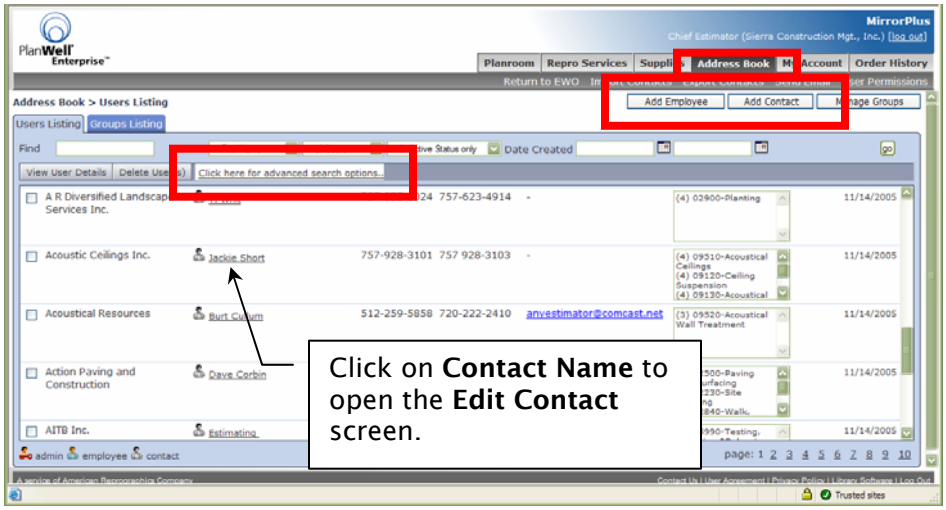
Print the **Import Data Report** to identify and clean up missing information, wrong CSI codes, etc. Once completed, import corrected records back into the template and use the wizard to upload again. Repeat this process until all desired records are imported successfully.

I. Working with an Address Book

Once the **Address Book** is loaded, you may proceed to edit existing contact information, or add new Bidders online (without use of the import template) and, most importantly, create and save subsets as pre-defined Groups with an associated filename.

Now that your **Address Book** has been imported, it can be easily searched to select appropriate Bidders to use on specific bid opportunities.

→ Click on the **Address Book** tab, ref. next screen.



The **Address Book** opens to initially display the **User Listing** screen shown above.

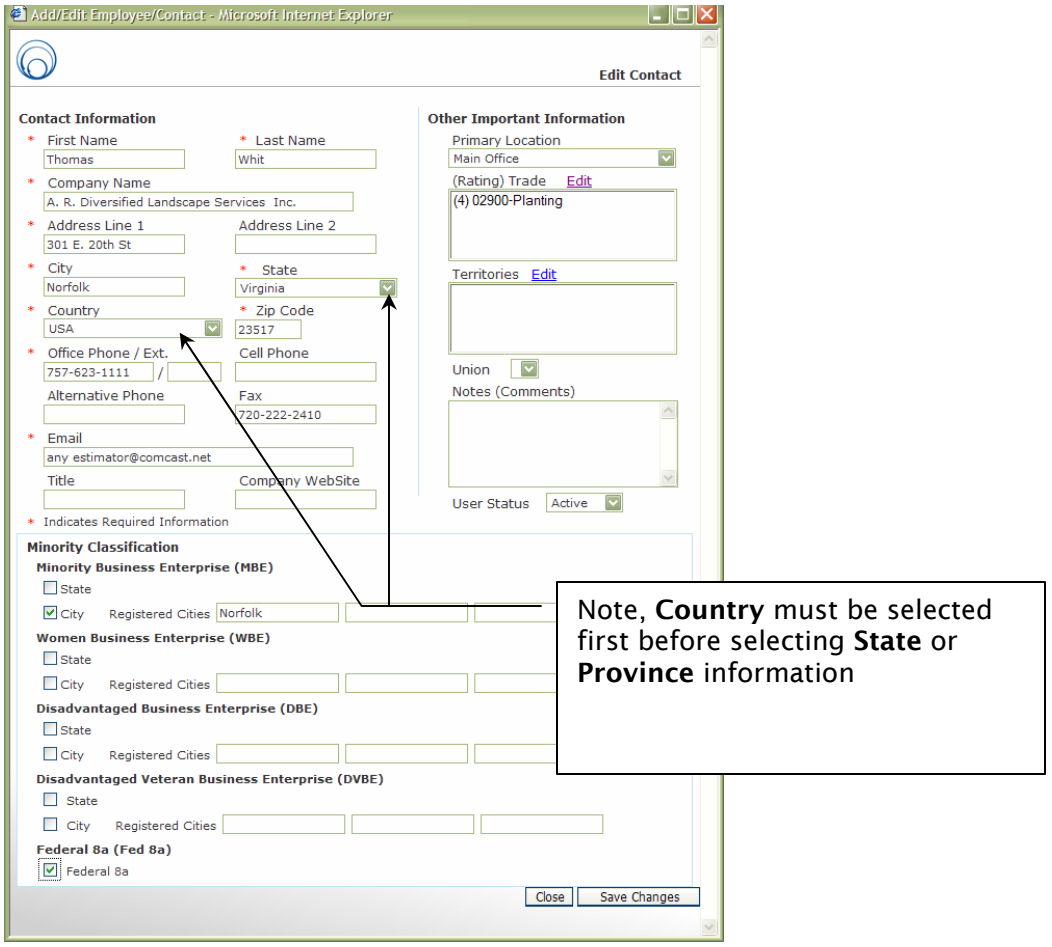
1. [Click here for advanced search options...](#) Although a Content Provider can search by selecting this link, it is reserved for use only with PlanWell. You will be directed to use a different search engine for BidCaster shortly.

2. **Add Contact information.** You may add new Bidders online by clicking on this button. It will open the **Edit Contact** screen, ref. next screen. Fill out the form to add the new Bidder while paying particular attention to required fields marked by a red asterisk (*).

3. **How to Edit Contact information.**

   → To edit a bidder record, click on the **Contact Name** to open the **Edit Contact** screen, ref. screen above.

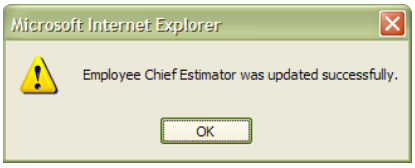
Use the same method as for **Add Contact** to edit contact information as required.



→ Then proceed to edit any criteria necessary.

→ Once completed, select **Save Changes** to complete the transaction.

A confirmation message will then appear.



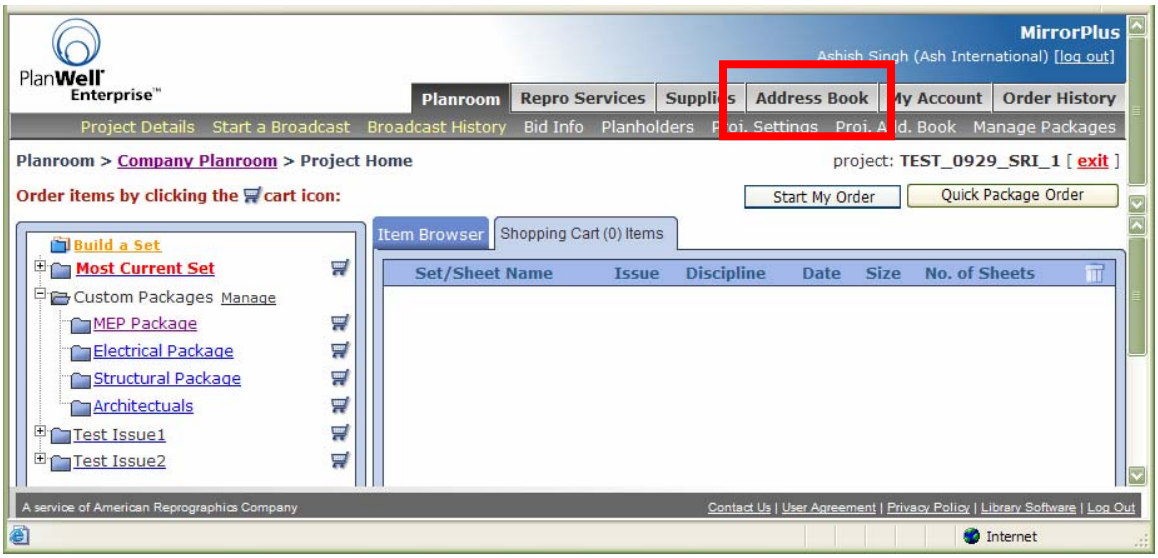
→ Click **OK**

5. Manage Groups to Create and Save Groups

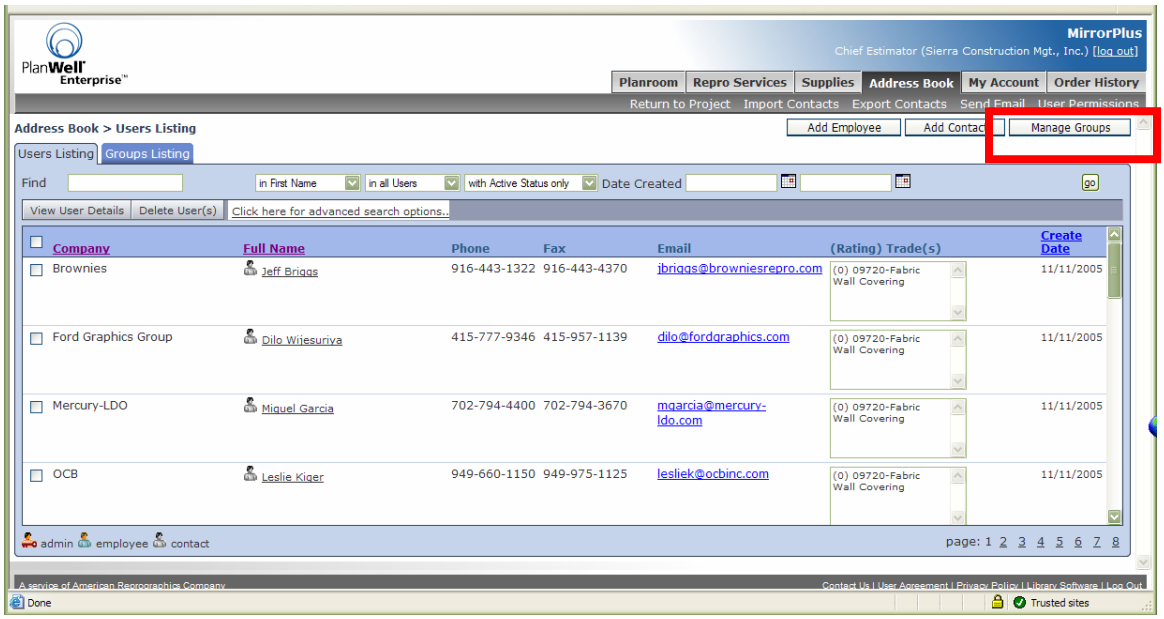
Now that your Address Book has been imported, it's time to search and select appropriate Bidders for use on a specific bid opportunity. Once selected, they can be saved as a Group using a custom name. This is an effective method in which you may pre-modeled groups to be used, for example on various different types of projects in various territories, i.e., schools, low rise buildings, high rise buildings, shopping centers, tenant finish, industrial, etc. Different Groups can be saved, changed and re-used as often as you like.

Begin the process:

→ Click on the **Address Book tab** from within the **Company Planroom**, ref. next screen.

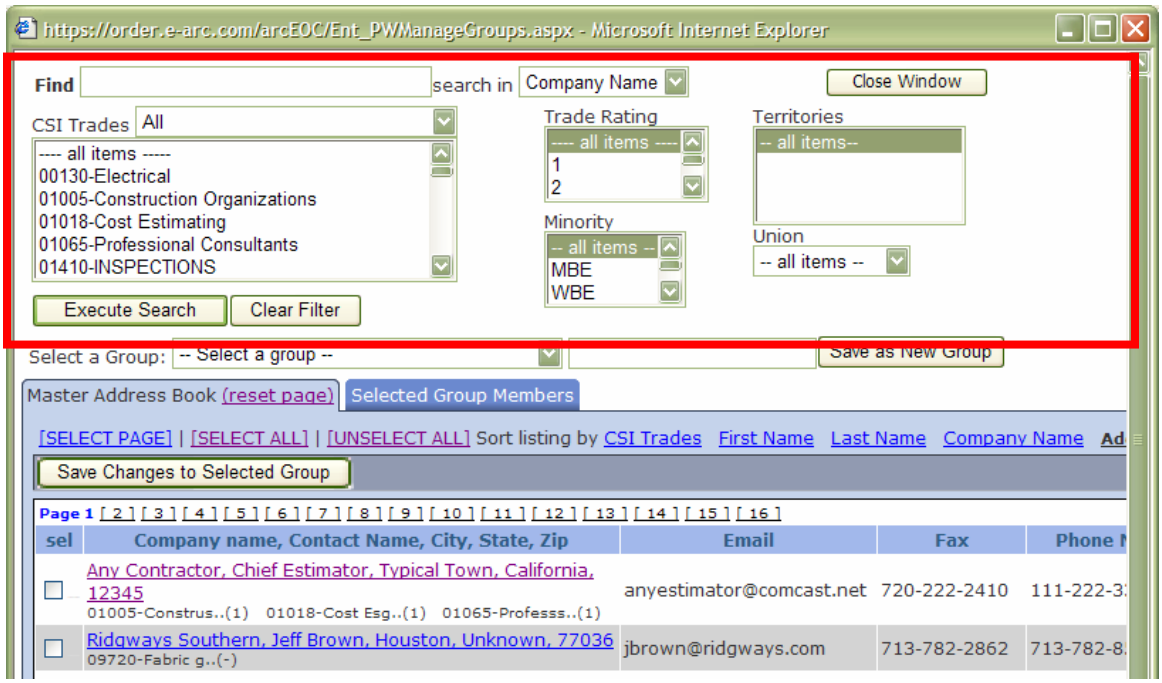


→ Click on **Manage Groups**

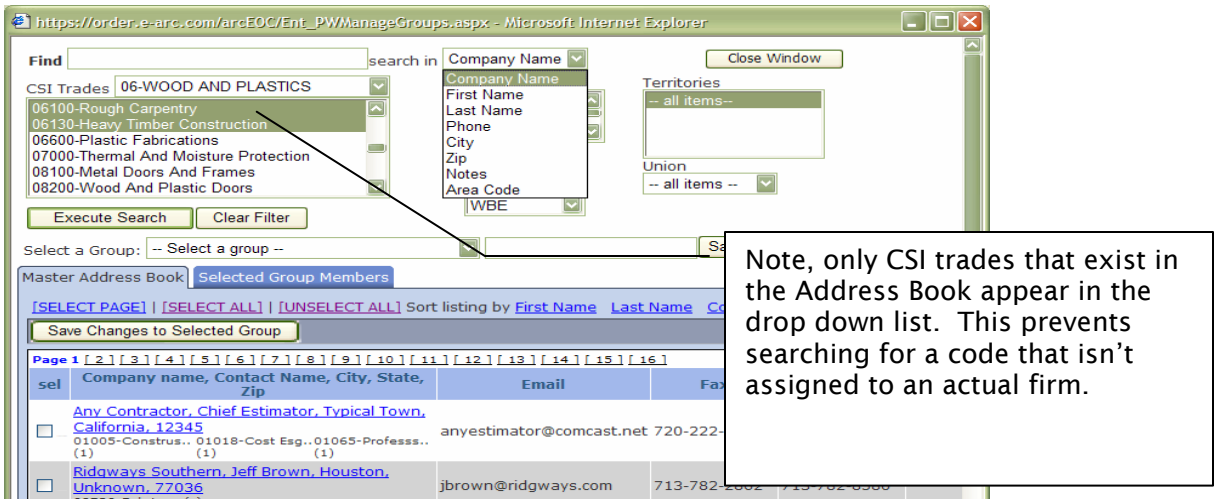


The **Manage Groups** screen now appears and defaults to display all Bidders inside the Address Book.

Use the various filters to quickly search and identify Bidders that you wish to save as a Group Name.

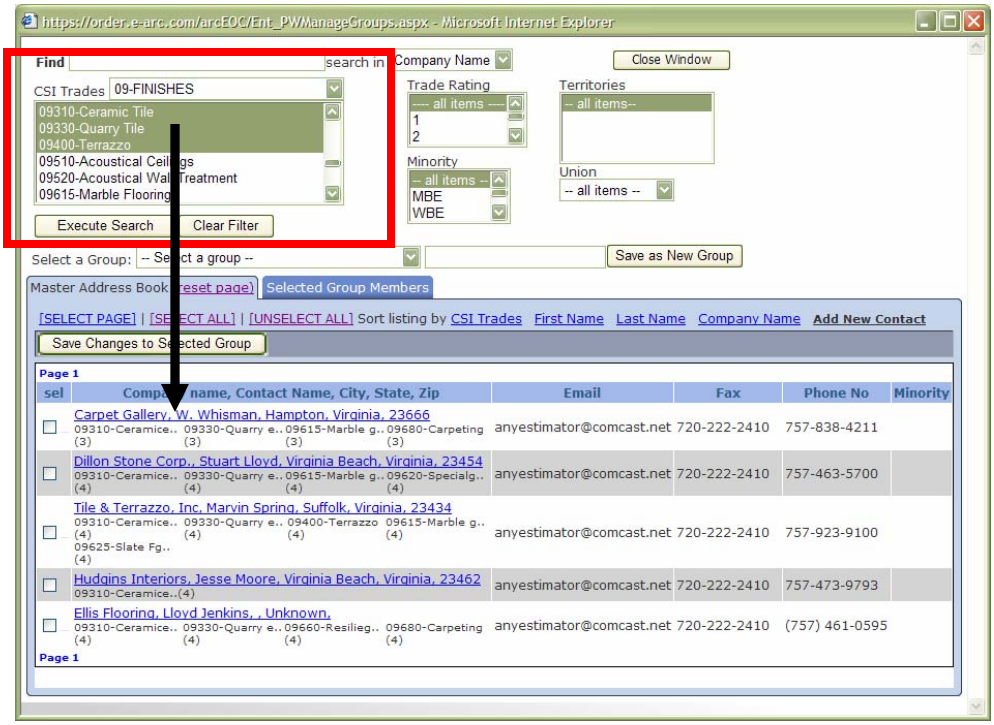


You may search simultaneously using the various types of filters shown, i.e., CSI Trades, Trade Rating, Territories, Union, & Minority Status as desired using drop down menus shown. Multiple filter criteria are selected by using standard Windows commands.


https://order.e-arc.com/arcEOC/Ent_PWManageGroups.aspx - Microsoft Internet Explorer
Find
search in
Company Name
Company Name
First Name
Last Name
Phone
City
Zip
Notes
Area Code
Close Window
CSI Trades
06-WOOD AND PLASTICS
06100-Rough Carpentry
06130-Heavy Timber Construction
06600-Plastic Fabrications
07000-Thermal And Moisture Protection
08100-Metal Doors And Frames
08200-Wood And Plastic Doors
Territories
-- all items--
Union
-- all items --
WBE
Execute Search
Clear Filter
Select a Group:
-- Select a group --
Master Address Book
Selected Group Members
[SELECT PAGE] | [SELECT ALL] | [UNSELECT ALL] Sort listing by First Name Last Name
Save Changes to Selected Group
Page 1 [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16]
sel
Company name, Contact Name, City, State, Zip
Email
Any Contractor, Chief Estimator, Typical Town, California, 12345
anyestimator@comcast.net
Ridgways Southern, Jeff Brown, Houston, Unknown, 77036
jbrown@ridgways.com
Note, only CSI trades that exist in the Address Book appear in the drop down list. This prevents searching for a code that isn't assigned to an actual firm.

→ Or use **Find** to search in a variety of areas as shown above.
→ Click on **Execute Search**

In the example below, we performed a search using multiple CSI Trades within Div 09 Finishes.



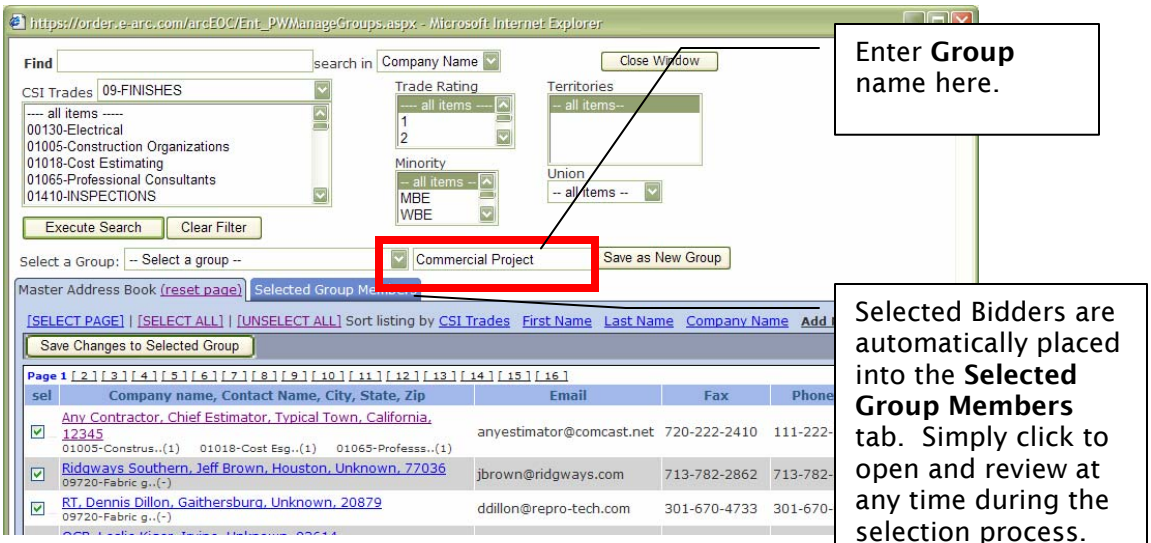
→ Proceed to check box all Bidders you wish to add to the Group name.

Once Bidders are selected,

→ Enter a Group name (ref next screen)

We have entered **Commercial Project** for purposes of the tutorial.

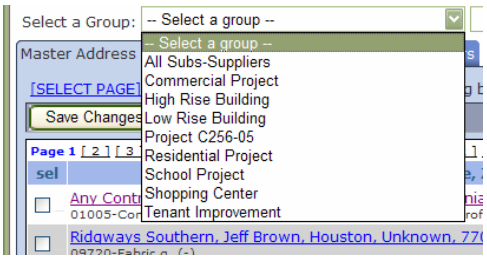
→ Click on **Save as New Group**


https://order.e-arc.com/arcEOC/Ent_PWManageGroups.aspx - Microsoft Internet Explorer
Find
search in
Company Name
Close Window
CSI Trades
09-FINISHES
00130-Electrical
01005-Construction Organizations
01018-Cost Estimating
01065-Professional Consultants
01410-INSPECTIONS
Trade Rating
Territories
Minority
MBE
WBE
Union
Execute Search
Clear Filter
Select a Group:
-- Select a group --
Commercial Project
Save as New Group
Master Address Book (reset page)
Selected Group Members
[SELECT PAGE] | [SELECT ALL] | [UNSELECT ALL] Sort listing by CSI Trades First Name Last Name Company Name
Save Changes to Selected Group
Page 1 [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16]
sel
Company name, Contact Name, City, State, Zip
Email
Fax
Phone
Any Contractor, Chief Estimator, Typical Town, California, 12345
anyestimator@comcast.net 720-222-2410
Ridgways Southern, Jeff Brown, Houston, Unknown, 77036
jbrown@ridgways.com 713-782-2862
RT, Dennis Dillon, Gaithersburg, Unknown, 20879
ddillon@repro-tech.com 301-670-4733
Enter Group name here.
Selected Bidders are automatically placed into the Selected Group Members tab. Simply click to open and review at any time during the selection process.

Selected Bidders will now appear inside the **Selected Group Mem** w. Note, when data is imported, it is automatically assigned a Group Name equal to the imported file name.

Add Bidders to an Existing Group

Adding to an existing **Group** is a simple process. First, use the **Select a Group** drop down menu to select the desired **Group**.



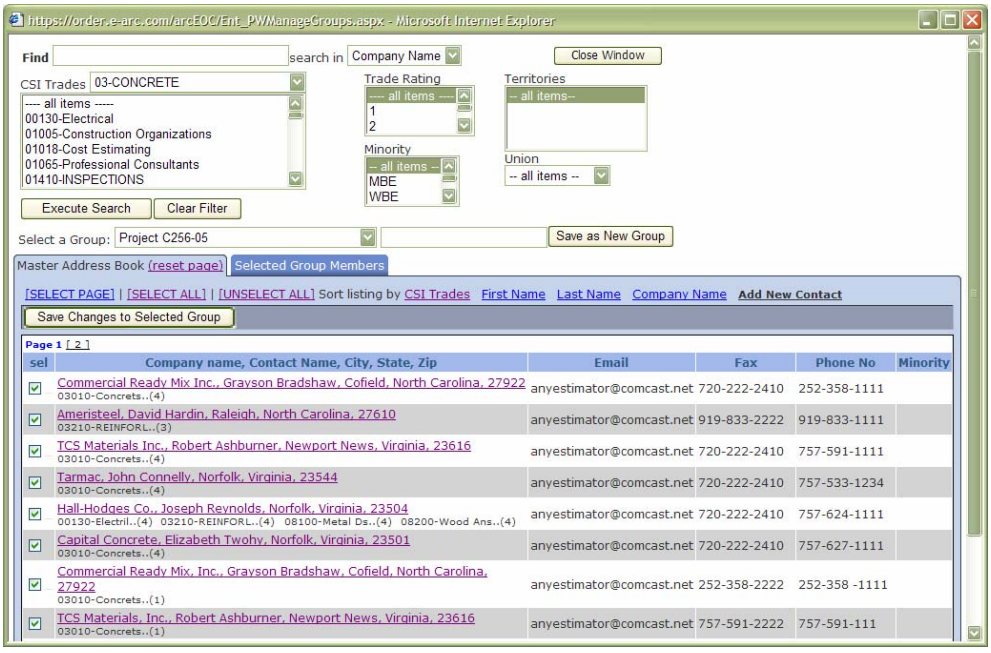
For tutorial purposes, we'll select **Project C256-05**.

Now use **CSI Trades** to select additional codes that you wish to add to the **Group** name. We have highlighted several Div 03 trades as shown on the next screen.

→ Click **Execute Search**

Those Bidders who meet the search criteria now appear below in the Master Address Book screen.

→ Proceed to check box those trades desired or simply click on **SELECT ALL.**
→ Now click on the **Selected Group Members** tab to add these to the **Group** named **Project C256-05.**

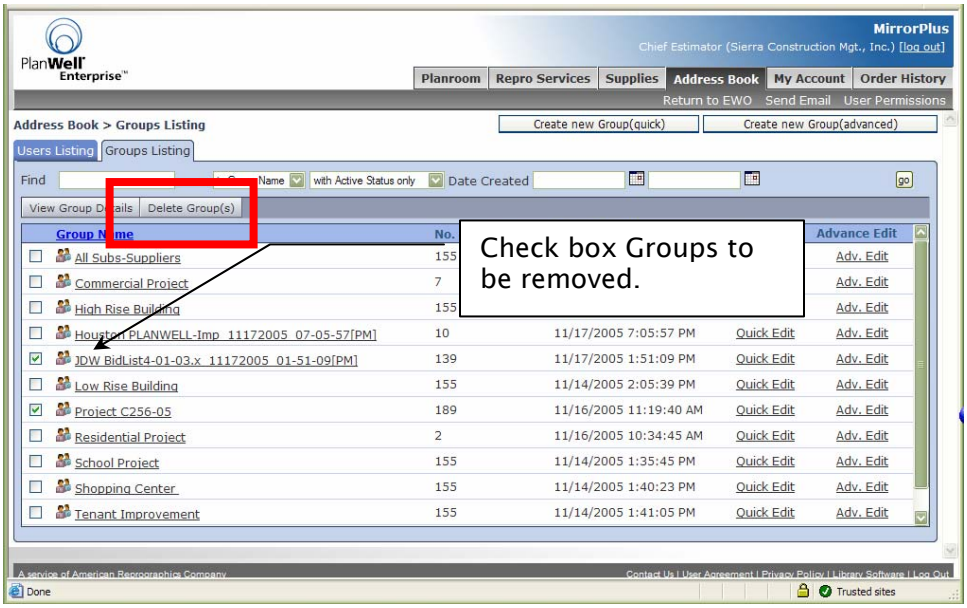


Deleting Groups

Here are the steps to delete a Group name, ref. next screen.

→ Go to Address Book → Group Listing tab.
→ Check box those Groups which are to be deleted.

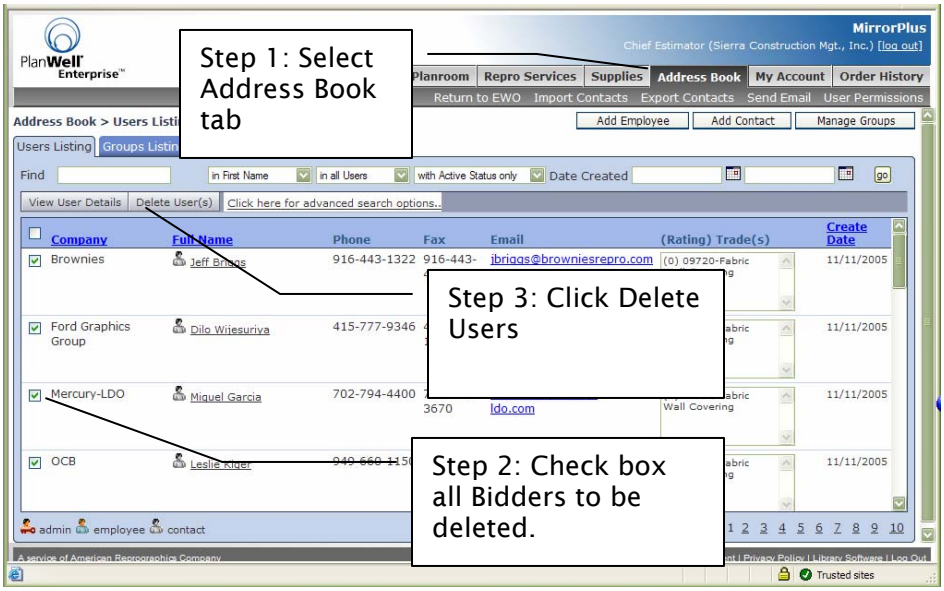
→ Click **Delete Group(s)**



Deleting a Group name does not delete the underlying bidder information in the database. This only removes the Group name.

Deleting Individual Bidders from an Address Book
If you need to delete individual bidders entirely from the database:

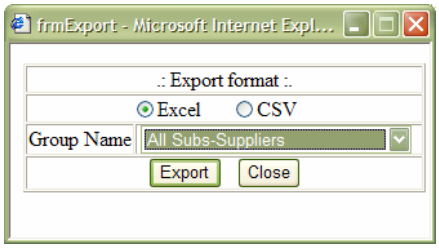
→ Go to **Address Book** → **User Listing** tab
→ Check box all Bidders to be deleted.
→ Select Delete User(s)
→ Click OK to confirm your intention to delete.



J. Exporting a Group or Entire Address Book

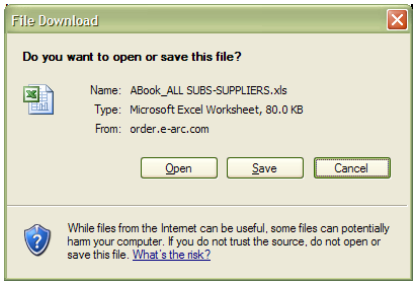
The Address Book should be backed up (exported) on a regular basis. Your PlanWell BidCaster Provider backs up all data every 24 hours in case an emergency restore is necessary. Note, we cannot provide 100% restoration of all lost data.

→ Go to **Address Book** → **Export Contacts**
→ Select to export by **Excel** or **CSV** (comma separated values)
→ Use the drop down menu to select the **Group Name**, in this case **All Subs-Suppliers**.



→ Click Export

The program will automatically assign a name to the file, ref. next screen.

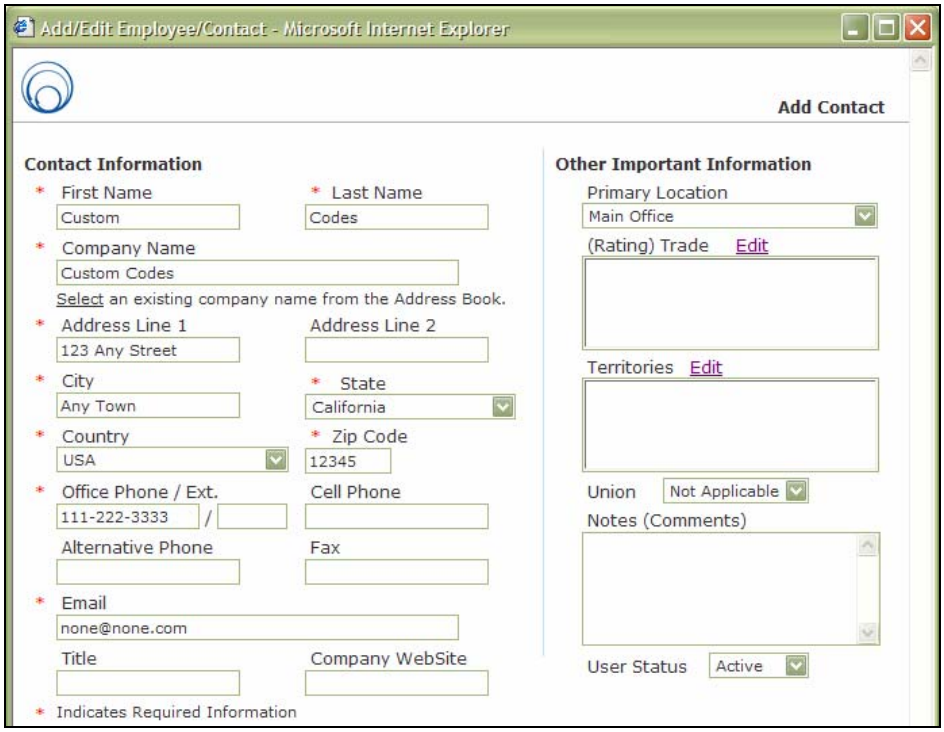

File Download
Do you want to open or save this file?
Name: ABook_ALL SUBS-SUPPLIERS.xls
Type: Microsoft Excel Worksheet, 80.0 KB
From: order.e-arc.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

→ Proceed to save the file to your hard drive.

K. Adding Custom CSI Trades

BidCaster now allows the creation of custom CSI Trade codes with associated descriptions. The first step is to create a Bidder called "Custom Codes" in which custom codes will be created. Whatever custom codes are created for this Contact (Bidder) will become available for selection to all in your Address Book. To accomplish, the following process must be followed verbatim, all steps must be followed without exception.

→ Click on **Address Book** tab
→ Click on **Add Contact**
→ Enter **Custom Codes** data shown below.



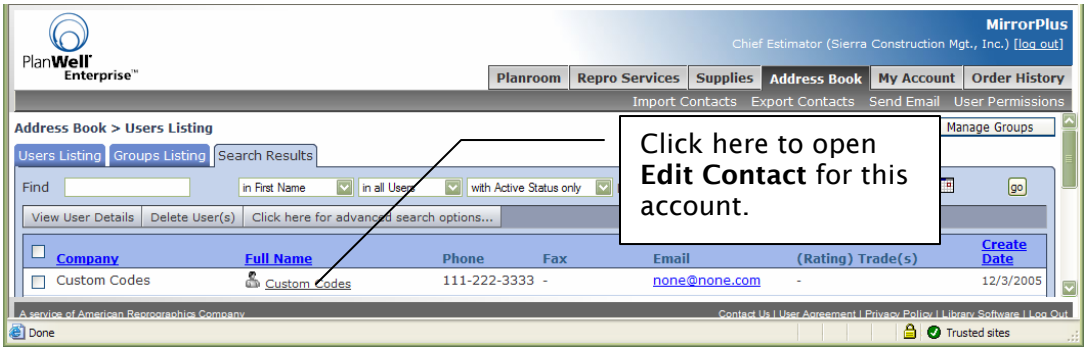
Once required demo data is entered,

→ Click **Save Changes** at the bottom of the screen and exit.

You are in the **Address Book** screen again.

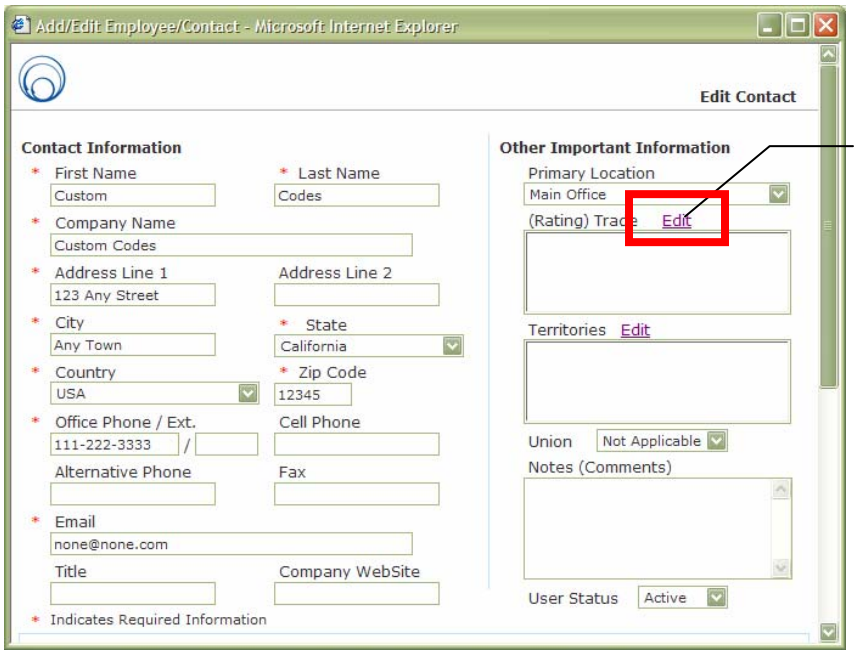
→ Enter "Custom" in the **Find** field.
→ Click Go

Search results will now display the account for "Custom Codes" only, ref. screen below.



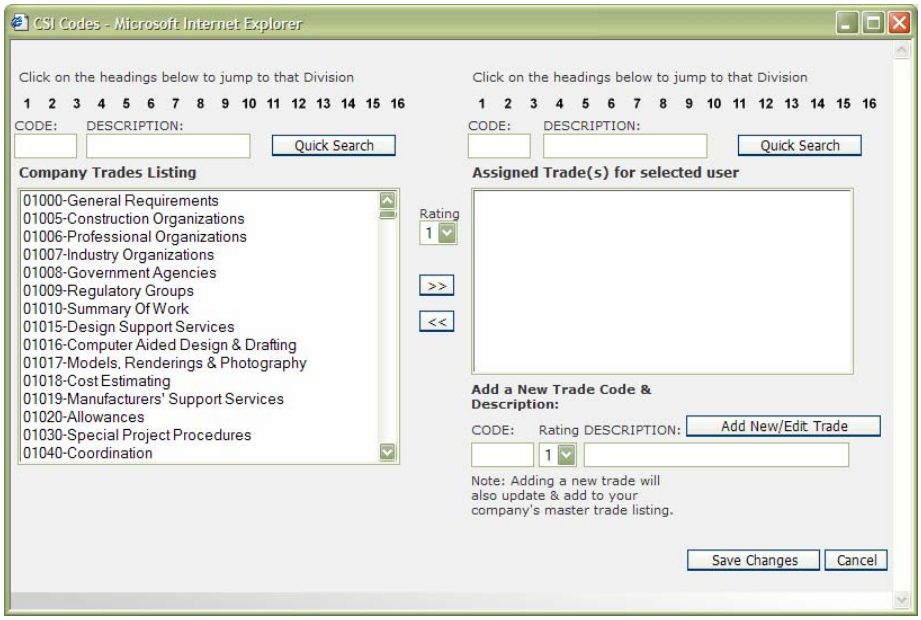
Click on the **Full Name** "Custom Codes".

→ Click on **Edit** for (Rating) Trade



Click on Edit.

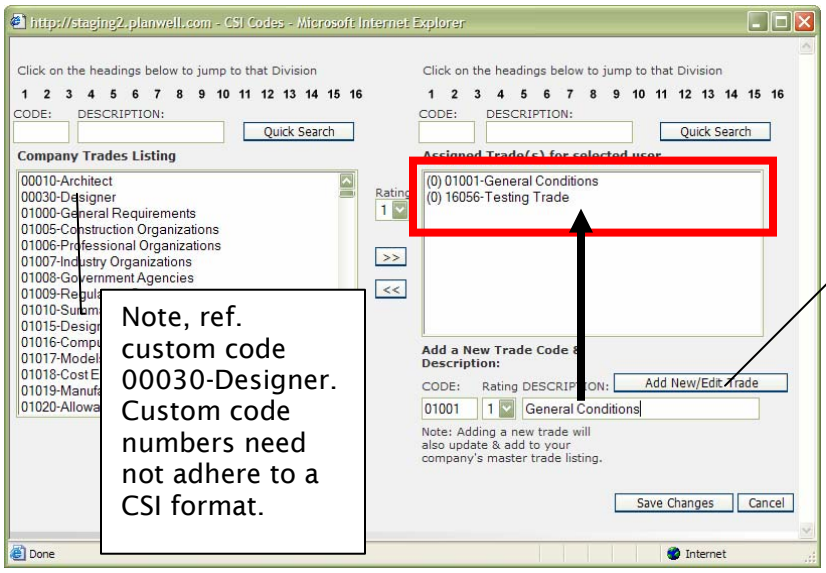
The **CSI Codes** screen will appear, ref. next screen.



Use the **Add a New Trade Code & Description** process repeatedly to add any number of desired custom codes with associated descriptions. Note, you may not overwrite any initial default CSI Trade codes or associated description that exist in the program. These reflect official CSI codes per the 1988 and 1995 CSI MasterFormat. Adding a new trade will also update & add to your **Company Trades listing** (Address Book).

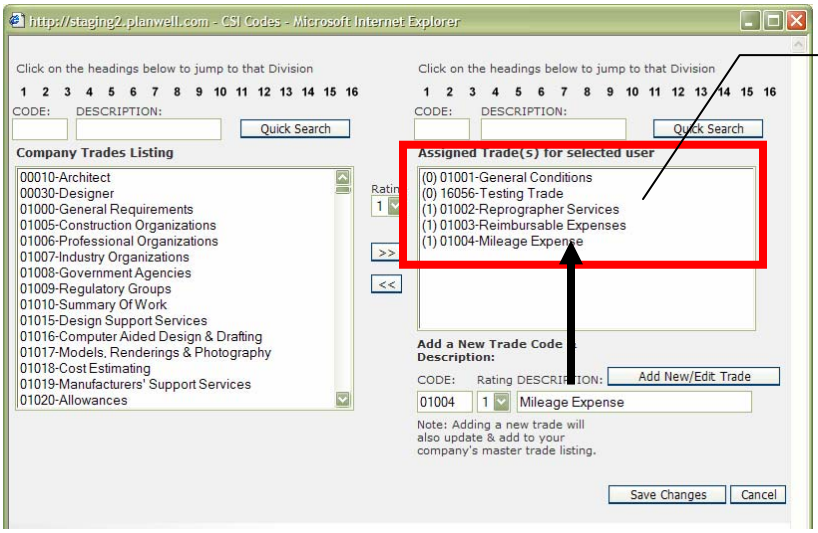
→ Under **Code,** enter a desired 5 digit custom code number.
→ Under **Rating,** enter a desire rating number from 1 to 5.
→ Under **Description**, enter a desired description.
→ Click Add New/Edit Trade

In the example below, custom code **01001 – General Conditions** has been added.


Click here to add custom codes.
Note, ref. custom code 00030-Designer. Custom code numbers need not adhere to a CSI format.
(0) 01001-General Conditions
(0) 16056-Testing Trade
01001
General Conditions
Add New/Edit Trade
Save Changes
Cancel

The new custom trade will appear under the **Assigned Trade(s) for selected user**.

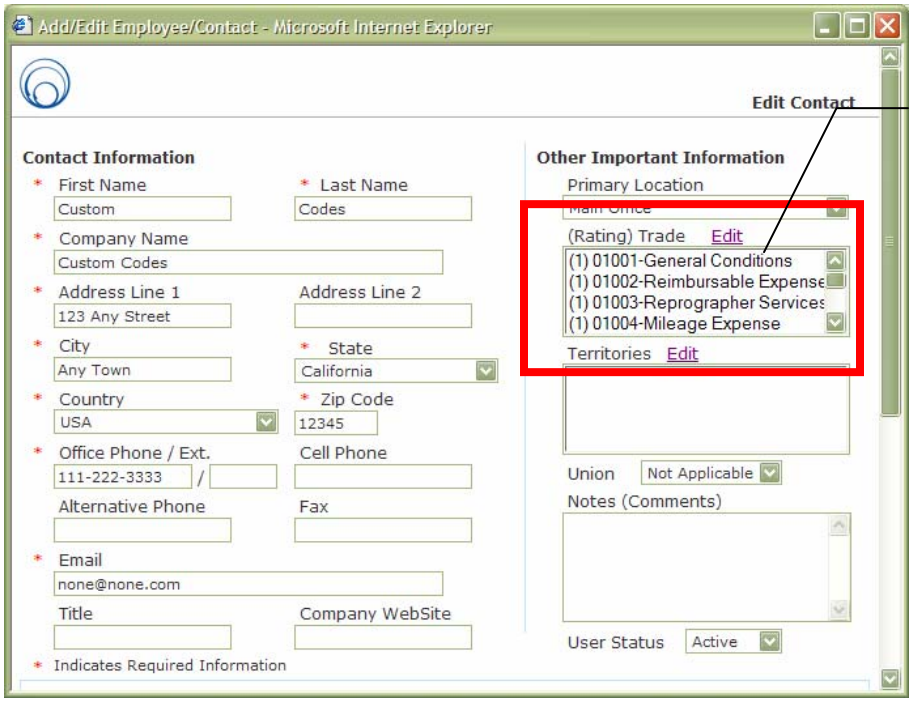
→ Repeat this process for each custom code to be added.



Once all custom codes have been entered,

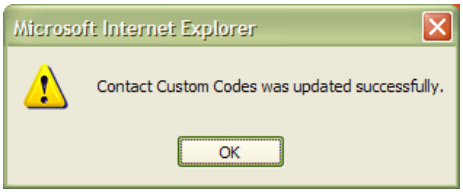
→ Click **Save Changes**

The **Edit Contact** screen will appear and display all custom codes.

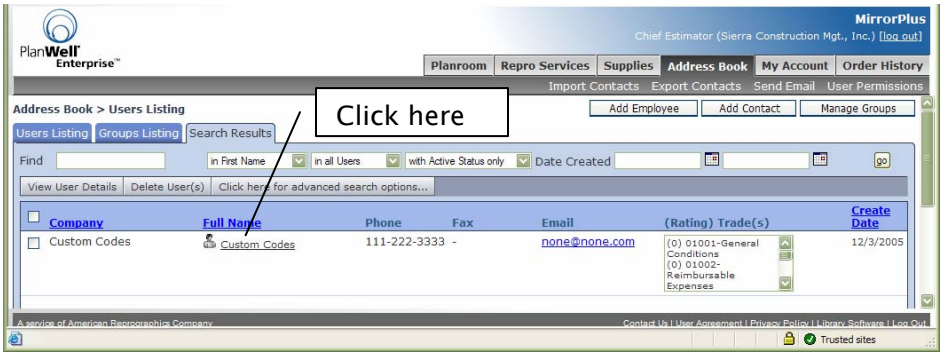


→ Click **Save Changes** at the bottom of the screen.

A confirmation message appears as follows to confirm creation of custom codes.



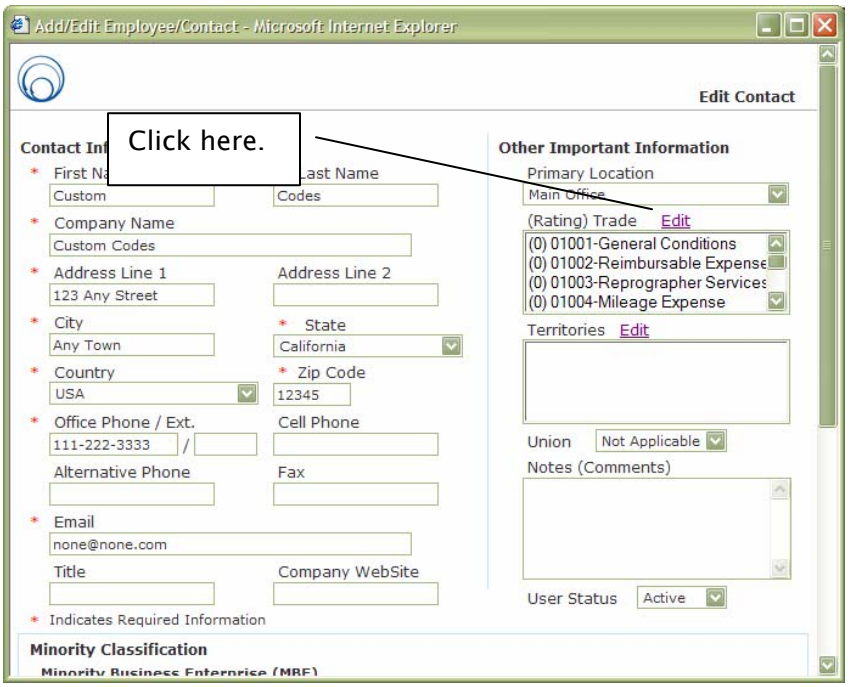
The **Address Book** screen appears, with **Search Results** set for "Custom Codes". Note that custom codes now display under **(Rating) Trades**. Also notice that the Rating has been set to (0) or no rating. This allows Ratings to be set individually for each Bidder (Contact) at a later date.



The next step is to transfer custom codes to the **Company Trades Listing**

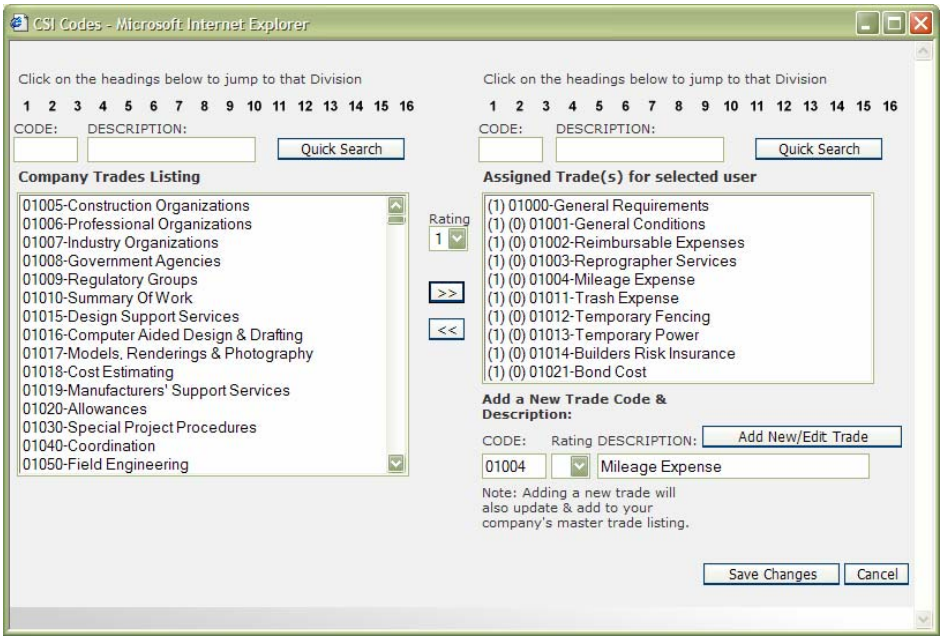
→ Click on the **Full Name** for "Custom Codes".

The **Edit Contact** screen appears.

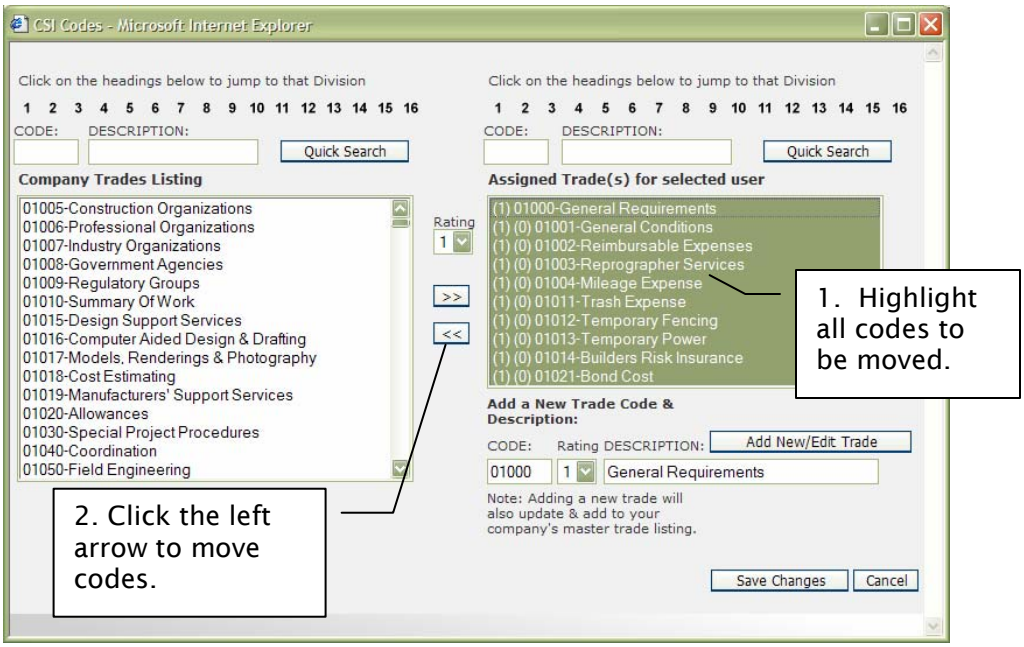


→ Once again, Click **Edit** for (Rating) Trade.

The CSI screen appears and displays all custom codes entered under **Assigned Trade(s) for selected user.**

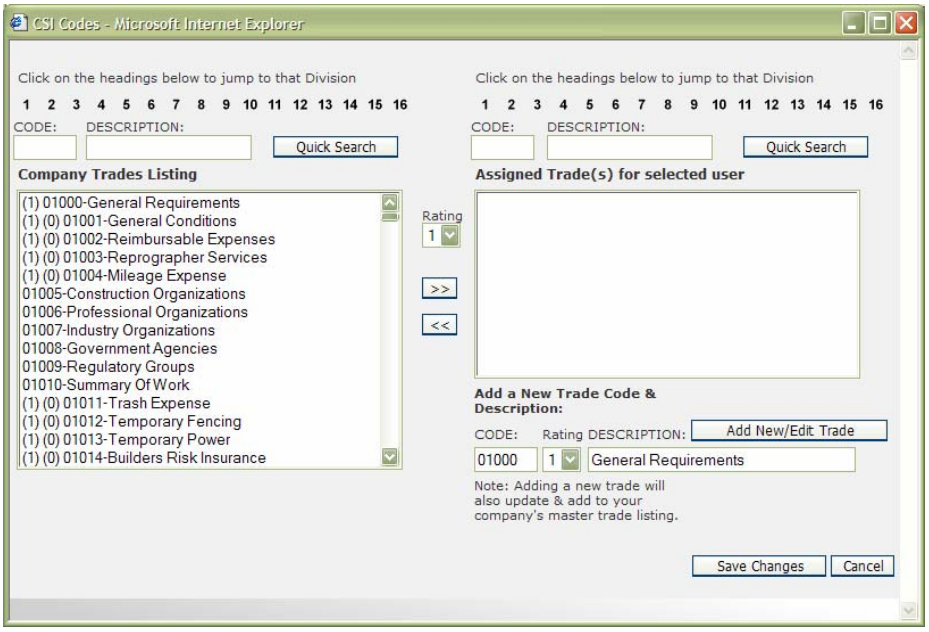


→ Proceed to highlight new custom codes to be moved to the **Company Trades Listing**.



→ Now Click the left arrow symbol to move the custom trade into the **Company Trades Listing box.**

Note, depending upon the number of custom codes transferred this operation may take some time, so please be patient. The screen will refresh to display custom codes within the **Company Trades Listing** box. Custom trades will display numerically in order based on the associated custom number.



→ Click on Save Changes before exiting.

Once codes are added in this fashion, they will display for every Contact (Bidder) in your Address Book using **Edit Contact**.

In the future, open the **Custom Codes** user account to quickly add new custom codes using this process.

L. Deleting an Entire Address Book

Please contact your PlanWell BidCaster Provider to delete your entire Address Book.

(End of Chapter 3)

Chapter 4 – Customizing Templates

A. Introduction

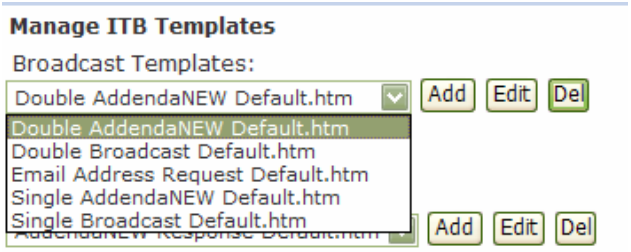
BidCaster™ templates are very similar to merge forms used in word processing programs such as MS Word and Word Perfect. The mail merge routine used in these programs takes a standard (or customized) form and merges in contact plus other information thereby producing individual letters for customers - all through a bulk load process. BidCaster™ uses the concept of forms (called templates) to accomplish the same goals.

Templates can be fully customized for both email and fax-based broadcasts. BidCaster™ uses templates to handle addenda information, announcements, memorandum, etc. There are obvious and subtle differences between the two primary templates which warrant discussion here.

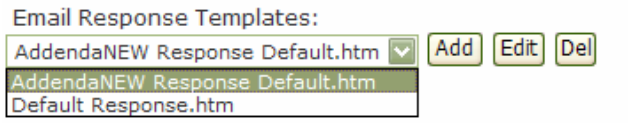
B. Default Templates

The program provides the following pre-defined default templates for each new user account. These can be accessed inside **My Account → Manage Templates**.

Broadcast Templates:



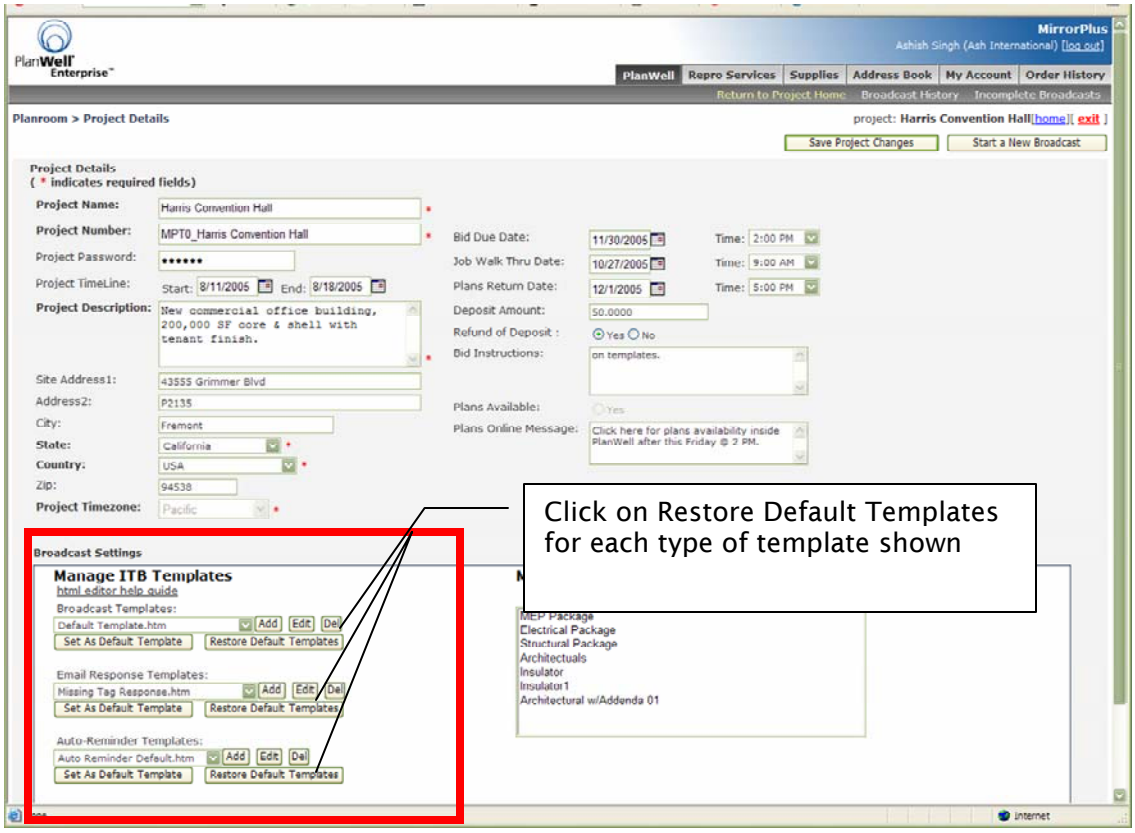
Response Templates:



Auto Reminder Template:

C. Restoring Deleted Default Templates

If a default template is ever inadvertently deleted, it can be restored within the Project Details screen by simply clicking on **Restore Default Templates** within the **Manage ITB Template** area for each type of template, i.e., Broadcast, Response and Auto-Reminder. Ref. the next screen for an example. Note, this process restores only default templates provided by the program.


Click on Restore Default Templates for each type of template shown
Manage ITB Templates
Broadcast Templates:
Email Response Templates:
Auto-Reminder Templates:
Set As Default Template
Restore Default Templates

D. Broadcast Template (Single Template Approach)

BidCaster now allows the option to use a single template to perform all necessary ITB tasks that previously took two templates (Double Template Approach) to accomplish, i.e., using a Broadcast and a Response template. Now a single Broadcast template can be utilized. In doing so, all links and merge tags that formerly applied only to a Response template can now be used in Broadcast templates.

E. Broadcast Template (Double Template Approach)

The broadcast template is typically used to create the initial invitation to bid (ITB) for a project then provide subsequent updates, addenda information, supplementary documentation, etc. to the Bidder (subcontractor and supplier) who's bidding on the project. It can be emailed and/or faxed to Bidders. In general, an ITB Broadcast template is comprised of the following:

a. Typically one page or less in size (but can be larger)
b. Merge tags (also called merge fields)
c. Identifies the company (general contractor, Content Provider, architect) soliciting the invitation to bid (ITB)
d. States this is an ITB broadcast
e. Identifies the individual Bidder company the broadcast is targeting
f. Provides sufficient project details to generate interest
g. Provides a hyperlink back to BidCaster™ (for email broadcast recipients only)
h. Typically includes follow-up instructions for the Bidder.

It's important to keep in mind there are different broadcast templates for different needs. Templates may also have different formats based on whether the broadcast uses email only, fax only or, a combination of both. BidCaster™ uses links embedded into broadcast templates that

allow email recipients (of the broadcast) to instantaneously access project details, view plan specifications and, order plans online. These links will be discussed in detail later in this chapter.

F. Response Template (used only with Double Template Approach)

First of all, Response Templates can only be used by those Bidders accepting email bid solicitations. If a Bidder clicks the link labeled **Click here for plans and viewing availability inside PlanWell..** (on the broadcast template), this link will take them to the BidCaster™ Response Template created for this project. While the Broadcast Template basically generates interest, the Response Template typically provides greater details, collects statistics, and facilitates the viewing and ordering of plans online. Response templates are named because this is where Bidders respond with a YES/NO bid acknowledgement by clicking on the BA (bid acknowledgment) hyperlinked sentence… **Click here to acknowledge that your firm will submit a qualified bid.**

The Response Template uses hyperlinks to link the customer to the PlanWell system (for online viewing and ordering of plans). The number of pages (size) of the Response Template isn't a concern as it can be of any length. Response Templates can be viewed and saved electronically without the need to print hard copies. Bid Acknowledgement Templates are also used by BidCaster™ to actively prompt a Bidder (via a pop-up screen) to indicate their desire (Yes or No) to participate in a bid. BidCaster™ captures bid acknowledgment information and provides statistics (number of Yes/No/Pending replies) obtained from all Bidders via a Broadcast Status Report.

G. Auto-Reminder Templates

Auto-Reminder Templates are now customizable, ref. default template below. We recommend inserting your company logo to replace the existing default BidCaster logo. Also please be careful not to delete the link sentence shown within when customizing.

H. Pros & Cons of Single versus Double Template Approaches

Single Broadcast Template - Pros.

a. Easy & simple to use.
b. Easily understood by GCs and Bidders.
c. Promotes higher participation by Bidders due to simplicity.
d. Can be emailed and faxed.

Single Broadcast Template – Cons

a. Difficult to limit broadcast templates to one page to minimize fax costs.
b. Can't correct mistakes on template after sending a broadcast.

Double Template – Pros

a. Broadcast Templates can be limited to one page to minimize fax costs.
b. Response Templates can be corrected after a broadcast is launched.
c. Response Templates can be unlimited in length.

Double Template – Cons

a. Slightly confusing to some GC Users and recipient Bidders…may promote slightly less participation by recipient Bidders.
b. Response templates can only be emailed, not faxed.

I. Recommendations re: Single vs. Double Template Approach

a. If you do not make typing mistakes, we suggest using the single template approach.
b. If you make numerous typing errors, we suggest using the double template approach.
c. If you are concern about limiting the number of fax pages sent, use the double template approach. If not, then use the single template approach.

d. If you are concerned about confusing recipient Bidders, use the single template approach. To date, Bidder feedback indicates that confusion is minimal overall, but can vary depending upon individual Subs and Suppliers.
e. If a majority of your Bidders have email, then the double template approach becomes viable. If not, then the single template approach is the best.

J. Merge Tags (Merge Fields)

The power of BidCaster™ templates comes from using merge tags and hyperlinks effectively. Merge tags are basically place holders for specific information in the template. Merge tags are used to insert information such as:

- General Contractor/Content Provider information (i.e., company name, contact name, address, phone fax, email address)
- Bidder information (i.e., company name, contact name, address, phone, fax, email address)
- Project-specific information (i.e., bid due date, project walk through date, project address, bid instructions)
- Additional information (i.e., current date/time, additional/personal messages, & hyperlinks)

K. Identifying Merge Tags

All merge tags are identified by brackets surrounding text. For example, the following are examples of some, but not all merge tags:

Merge Tag	Description
[Date_Today]	today's date and time with time zone
[To_Company_Name]	company name of Bidder
[To_Contact]	contact name of Bidder
[From_Address]	company address of Content Provider
[From_Zip]	zip code of Content Provider
[Project_Name]	project name
[Broadcast_Name]	broadcast title
[Broadcast_Attachment]	File attachments sent with each broadcast
[Bid_Instructions]	bid instructions
[POL_Message]	Plans Online message
[Broadcast_APO]	Assigned Print Order (for different Bidders)

L. Critical Merge Tags & Links in Templates

The following merge tags are deemed critical to the success of an ITB and should always exist in templates indicated in the table below before launching a broadcast. Fortunately, the program will automatically check for the existence of any merge tags that are missing in a template for which project data exists before allowing a User to send a broadcast.

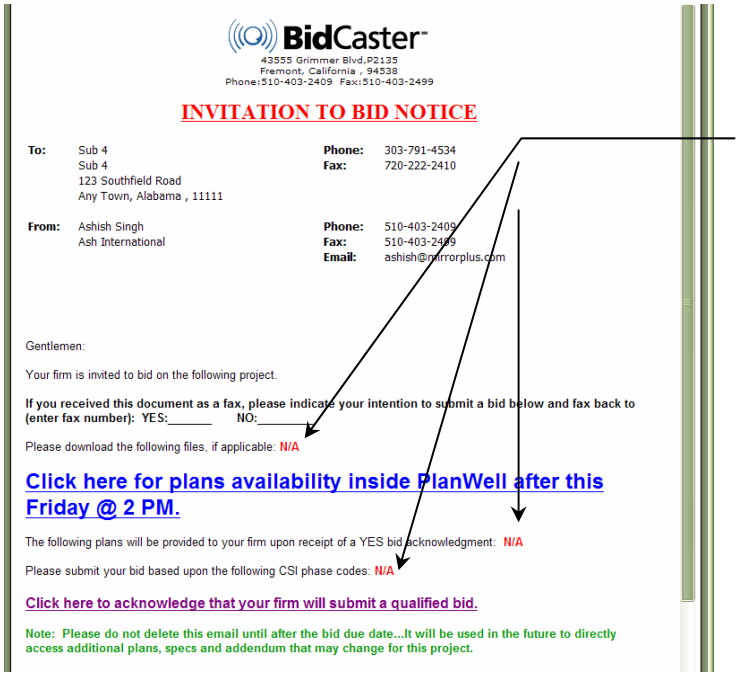
Merge Tag Description	Single Template Approach	Double Template Approach
[POL_Message]	Broadcast template	Response template
[Broadcast_Attachment]	Broadcast template	Response template
[Price_CSI_Codes]	Broadcast template	Response template
[Broadcast_APO]	Broadcast template	Response template
BRT link	Not Applicable	Broadcast template (only)
BA link	Broadcast template	Response template

Note: BidCaster will check for the existence of critical merge tags inside templates, but will not prevent a user from launching a broadcast without them. This provides needed flexibility when a general contractor wishes to send out an ITB without linking to PlanWell, other templates or websites. Remember: When doing so, tracking within the BSR is severely limited.

M. Rules for using Merge Tags

There are specific rules for using merge tags:

a. Merge tags are case sensitive. They must be spelled exactly including brackets. Due to a high chance of error, we do not recommend typing merge tags into templates and recommend using the pull-down menu process instead.
b. Insert merge tags by using the Insert Merge Field pull-down menu.
c. All merge tags can be used in any template..
d. If the merge tag associated with a specific piece of information isn't in the template, the corresponding information won't be in the template either. For example, if you have created bid instructions and want those instructions in the broadcast template, you must add the [Bid_Instructions] merge tag to the template. Conversely, if you don't need certain information in the template, don't include the corresponding merge tag.
e. When a merge tag exists in a template and no data populates the merge tag, the program will automatically display "NA", ref. next screen. Benefit: This allow use of standard templates in broadcasts.


BidCaster
43555 Grimmer Blvd,P2135
Fremont, California , 94538
Phone:510-403-2409 Fax:510-403-2499

INVITATION TO BID NOTICE

To: Sub 4
Sub 4
123 Southfield Road
Any Town, Alabama , 11111
Phone: 303-791-4534
Fax: 720-222-2410

From: Ashish Singh
Ash International
Phone: 510-403-2409
Fax: 510-403-2409
Email: ashish@mirrorplus.com

Gentlemen:

Your firm is invited to bid on the following project.

If you received this document as a fax, please indicate your intention to submit a bid below and fax back to (enter fax number): YES:_____ NO:_____

Please download the following files, if applicable: N/A

Click here for plans availability inside PlanWell after this Friday @ 2 PM.

The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: N/A

Please submit your bid based upon the following CSI phase codes: N/A

Click here to acknowledge that your firm will submit a qualified bid.

Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change for this project.

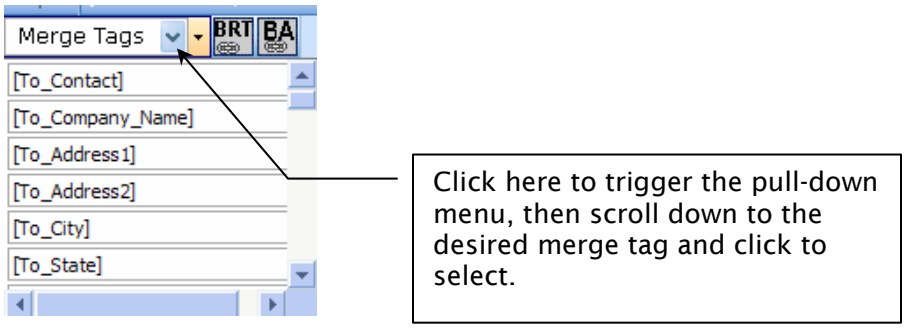
The program automatically displays "NA" when data does not exist to populate a merge tag.

f. Insert the merge tag into the template where you wish to place the corresponding information.
g. Merge tag information will insert wrap text within the template according to formats defined.

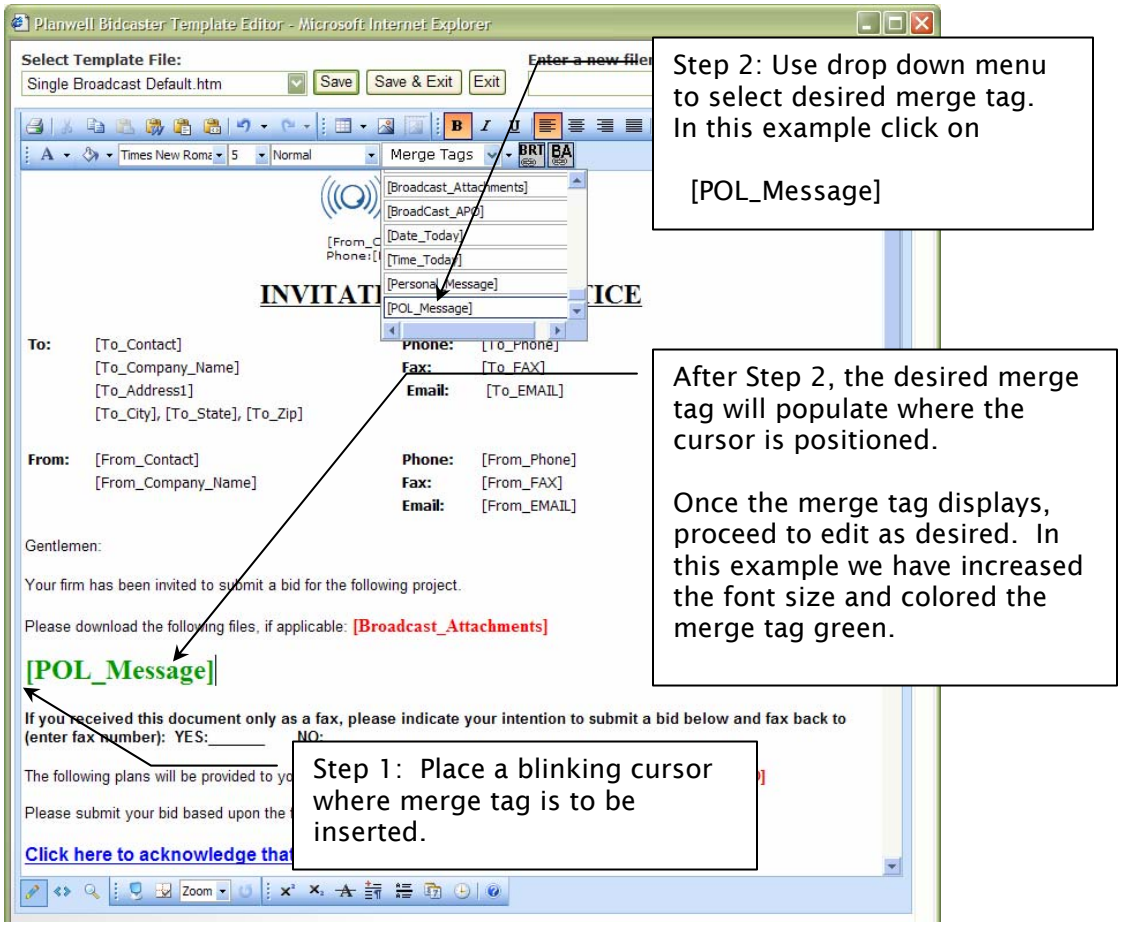
N. Inserting a Merge Tag

Inserting a merge tag is relatively straight-forward.

→ While editing a template, position the cursor where you want the merge field.
→ Click on the **Insert Merge Field** pull-down menu and select the merge tag to insert.



We recommend creating a descriptive text preceding the merge tag as seen in templates throughout this manual. You can also change the color of merge tags to make them stand out. See the example **[POL_Message]** below. Inserting a Merge Tag (example)


Planwell Bidcaster Template Editor - Microsoft Internet Explorer
Select Template File:
Single Broadcast Default.htm
Save
Save & Exit
Exit
Merge Tags
[Broadcast_Attachments]
[BroadCast_APOD]
[Date_Today]
[Time_Today]
[Personal_Message]
[POL_Message]
To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone: [To_Phone]
Fax: [To_FAX]
Email: [To_EMAIL]
From: [From_Contact]
[From_Company_Name]
Phone: [From_Phone]
Fax: [From_FAX]
Email: [From_EMAIL]
Gentlemen:
Your firm has been invited to submit a bid for the following project.
Please download the following files, if applicable: [Broadcast_Attachments]
[POL_Message]
If you received this document only as a fax, please indicate your intention to submit a bid below and fax back to (enter fax number): YES:_____ NO:
Step 2: Use drop down menu to select desired merge tag. In this example click on
[POL_Message]
After Step 2, the desired merge tag will populate where the cursor is positioned.
Once the merge tag displays, proceed to edit as desired. In this example we have increased the font size and colored the merge tag green.
Step 1: Place a blinking cursor where merge tag is to be inserted.

O. The [POL_Message] Merge Tag

This_merge tag is referred to as the Plans Online (POL) message tag. It provides one click access to online plans, specs and addenda inside PlanWell by recipient Bidders. This "tag" is special in that it by-passes the need for Bidders to remember project passwords, yet provides direct access by secure invitation from GCs. In doing so, confidentiality is maintained.

HyperLink	Description
[POL_Message]	Provides a link to PlanWell when plans are available online for viewing and print ordering purposes.

The Plans OnLine Message **[POL_Message]** merge tag populates with a standard default sentence as follows:

Click here for plans availability & viewing inside PlanWell...

This sentence can be edited within the **Project Details** screen. Look for the **Plans Online Message [POL_Message]** prompt.

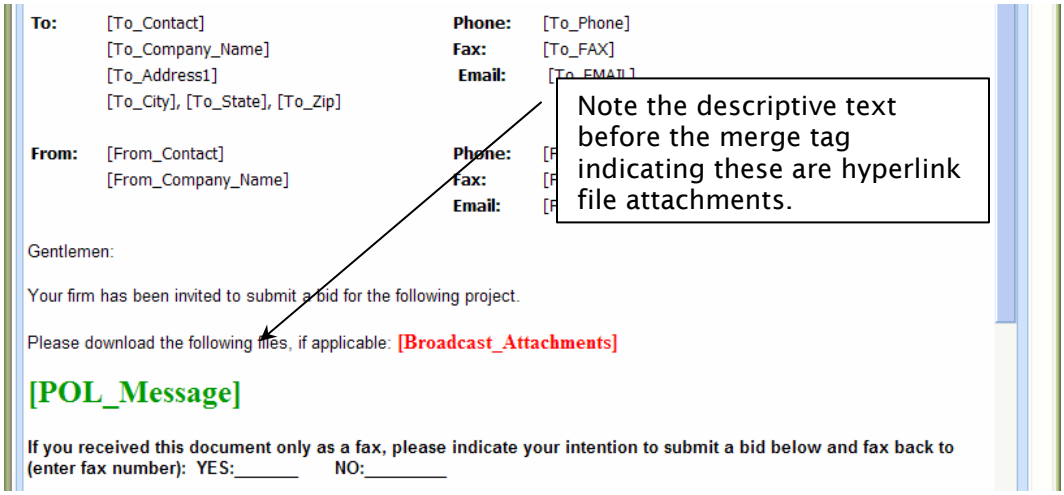
P. The [Broadcast_Attachment] Merge Tag

BidCaster™ supports linked file attachments that show up in templates and can be downloaded and viewed. This section will address using hyperlinks in email ITB broadcasts.

Merge Tag	Description
[Broadcast_Attachment]	Provides a hyperlink to files attached in an ITB broadcast.

This merge tag can only be used in all templates. Here are the steps to insert the merge tag:

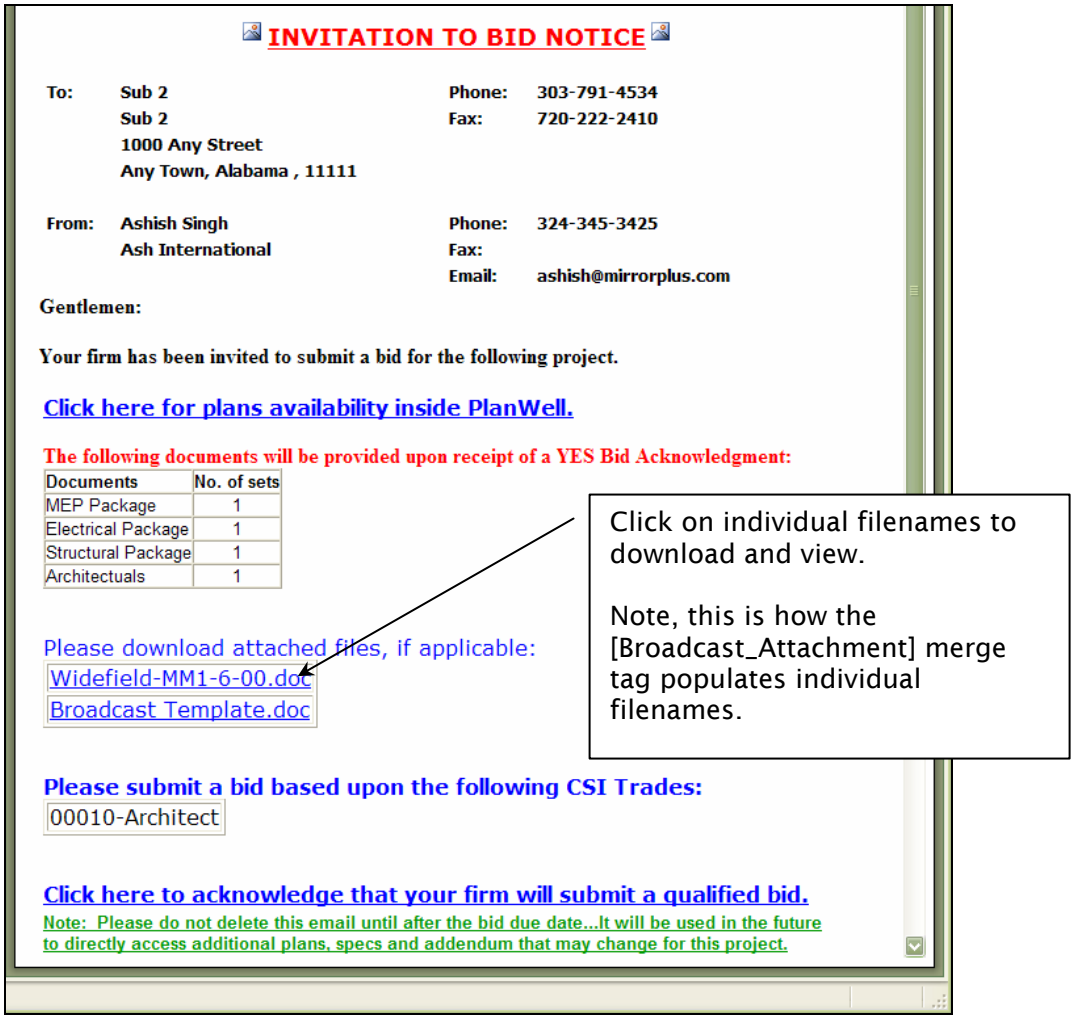
→ Edit the response template for the ITB broadcast.
→ Position the cursor where you want the merge tag then click the **Insert Merge Field** pull-down menu and select **[Broadcast_Attachment]**.


To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone: [To_Phone]
Fax: [To_FAX]
Email:
From: [From_Contact]
[From_Company_Name]
Note the descriptive text before the merge tag indicating these are hyperlink file attachments.
Gentlemen:
Your firm has been invited to submit a bid for the following project.
Please download the following files, if applicable: [Broadcast_Attachments]
[POL_Message]
If you received this document only as a fax, please indicate your intention to submit a bid below and fax back to (enter fax number): YES:_____ NO:_____

Q. Viewing response template when Downloadable Files Display

The partial screen below shows how hyperlinks appear in the response template. In this example, the bidder has already viewed the Broadcast template then clicked on the BRT hyperlinked sentence to view the Response template.

To download a file for viewing purposes, the bidder simply clicks on desired filename, ref. screen below.


INVITATION TO BID NOTICE
To: Sub 2
Sub 2
1000 Any Street
Any Town, Alabama , 11111
Phone: 303-791-4534
Fax: 720-222-2410
From: Ashish Singh
Ash International
Phone: 324-345-3425
Fax:
Email: ashish@mirrorplus.com
Gentlemen:
Your firm has been invited to submit a bid for the following project.
Click here for plans availability inside PlanWell.
The following documents will be provided upon receipt of a YES Bid Acknowledgment:
Documents | No. of sets
MEP Package | 1
Electrical Package | 1
Structural Package | 1
Architectuals | 1
Please download attached files, if applicable:
Widefield-MM1-6-00.dot
Broadcast Template.doc
Please submit a bid based upon the following CSI Trades:
00010-Architect
Click here to acknowledge that your firm will submit a qualified bid.
Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change for this project.
Click on individual filenames to download and view.
Note, this is how the [Broadcast_Attachment] merge tag populates individual filenames.

R. Editing Templates

You can edit templates one of several ways:

a. In the **My Account → Manage Templates** screen, you can create, edit and delete any template.
b. In Step 1: **Invitation Details**, you can view and edit the Broadcast template.
c. In Step 3: **Optional Invitation Settings**, you can view and edit any Response template.
d. In the **Broadcast Status Report**, you can edit and re-set the Response template, but only when using the Double Template approach.
e. You may also cut and paste from Microsoft Word directly into the HTML Editor.

S. Pasting Microsoft Word Documents into HTML Editor

The BidCaster HTML Editor program is unique since it allows pasting from a Word document.

This is accomplished by using the **Paste from Word** icon located in the Toolbar. Note: Most standard HTML editors do not allow pasting from Word due to embedded code that prevents it from becoming a viable web page document. Benefit: This allows users to:

a. Prepare the bulk of their ITB document in Word, then paste into the Editor.
b. Copy/Paste existing ITB documents prepared in Word directly into the HTML editor.

The end result is a significant time savings and increased ease of use.

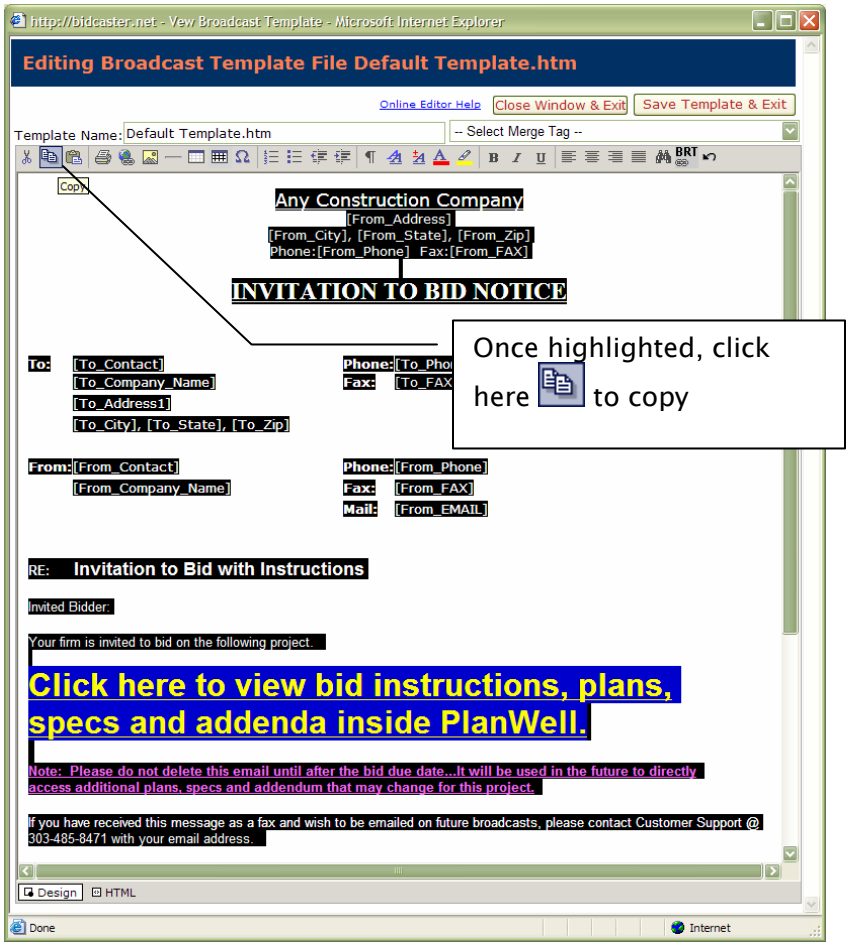
The following rules apply when pasting from Word:

a. BidCaster hyperlinks must still be inserted.
b. Applicable merge tags must be inserted.

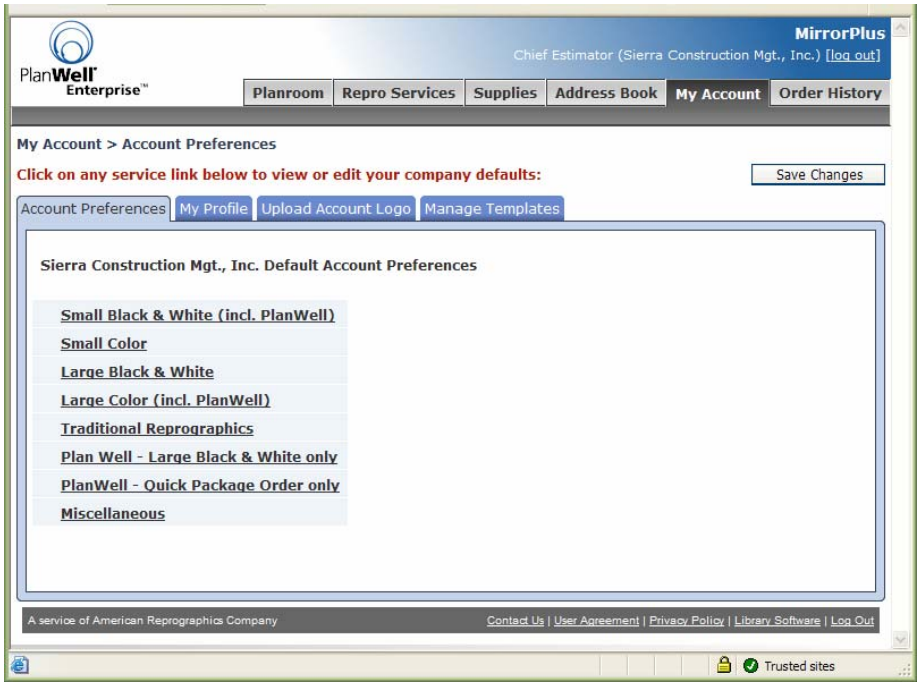
T. Copying Existing BidCaster Templates from the Old Program

If you are an existing user of the previous version of BidCaster, you may want to copy all of your existing templates over to the new program. This is accomplished as follows:

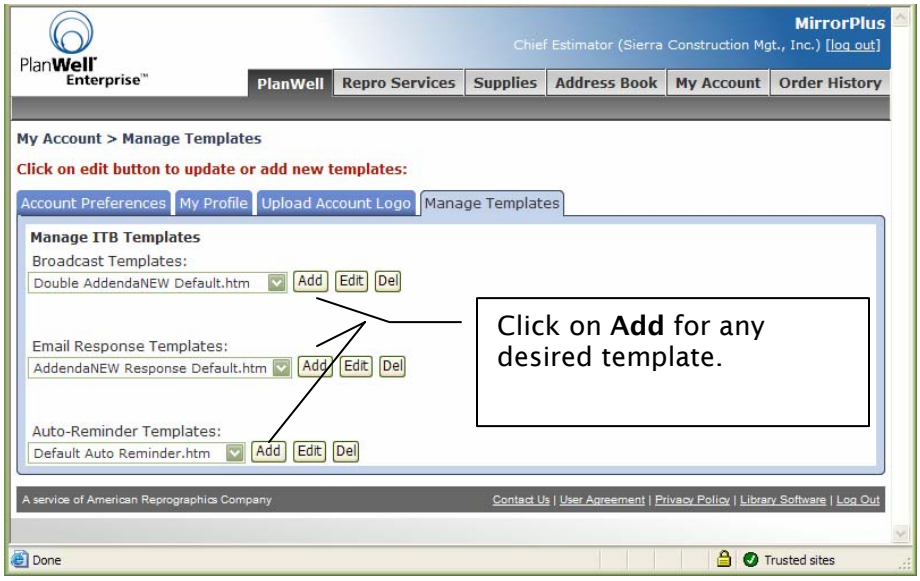
→ Open any existing BidCaster Template in the old program.
→ Highlight text to be copied, ref. screen below.
→ Click on the copy icon
→ Click Close Window & Exit
→ Log off from the old program.


http://bidcaster.net - View Broadcast Template - Microsoft Internet Explorer
Editing Broadcast Template File Default Template.htm
Online Editor Help
Close Window & Exit
Save Template & Exit
Template Name: Default Template.htm
-- Select Merge Tag --
Copy
Any Construction Company
[From_Address]
[From_City], [From_State], [From_Zip]
Phone:[From_Phone] Fax:[From_FAX]
INVITATION TO BID NOTICE
To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone:[To_Pho
Fax: [To_FAX
From:[From_Contact]
[From_Company_Name]
Phone:[From_Phone]
Fax: [From_FAX]
Mail: [From_EMAIL]
RE: Invitation to Bid with Instructions
Invited Bidder:
Your firm is invited to bid on the following project.
Click here to view bid instructions, plans, specs and addenda inside PlanWell.
Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change for this project.
If you have received this message as a fax and wish to be emailed on future broadcasts, please contact Customer Support @ 303-485-8471 with your email address.
Design
HTML
Done
Internet
Once highlighted, click here to copy

→ Log into the new program.
→ My Account → Manage Templates

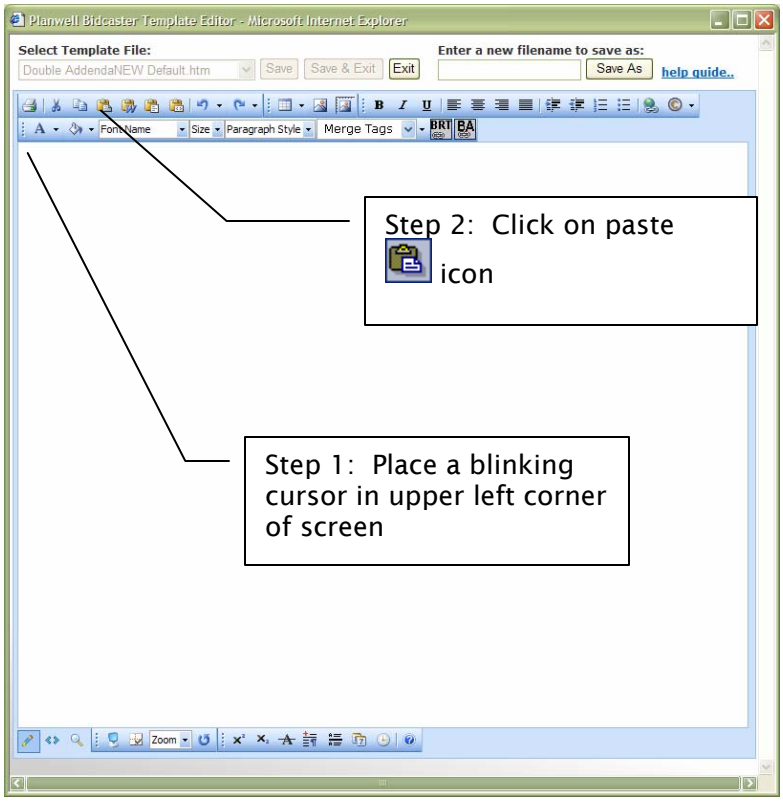

MirrorPlus
Chief Estimator (Sierra Construction Mgt., Inc.) [log out]
PlanWell Enterprise
Planroom
Repro Services
Supplies
Address Book
My Account
Order History
My Account > Account Preferences
Click on any service link below to view or edit your company defaults:
Save Changes
Account Preferences
My Profile
Upload Account Logo
Manage Templates
Sierra Construction Mgt., Inc. Default Account Preferences
Small Black & White (incl. PlanWell)
Small Color
Large Black & White
Large Color (incl. PlanWell)
Traditional Reprographics
Plan Well - Large Black & White only
PlanWell - Quick Package Order only
Miscellaneous
A service of American Reprographics Company
Contact Us | User Agreement | Privacy Policy | Library Software | Log Out
Trusted sites

→ Click on **Add** for any desired Template.

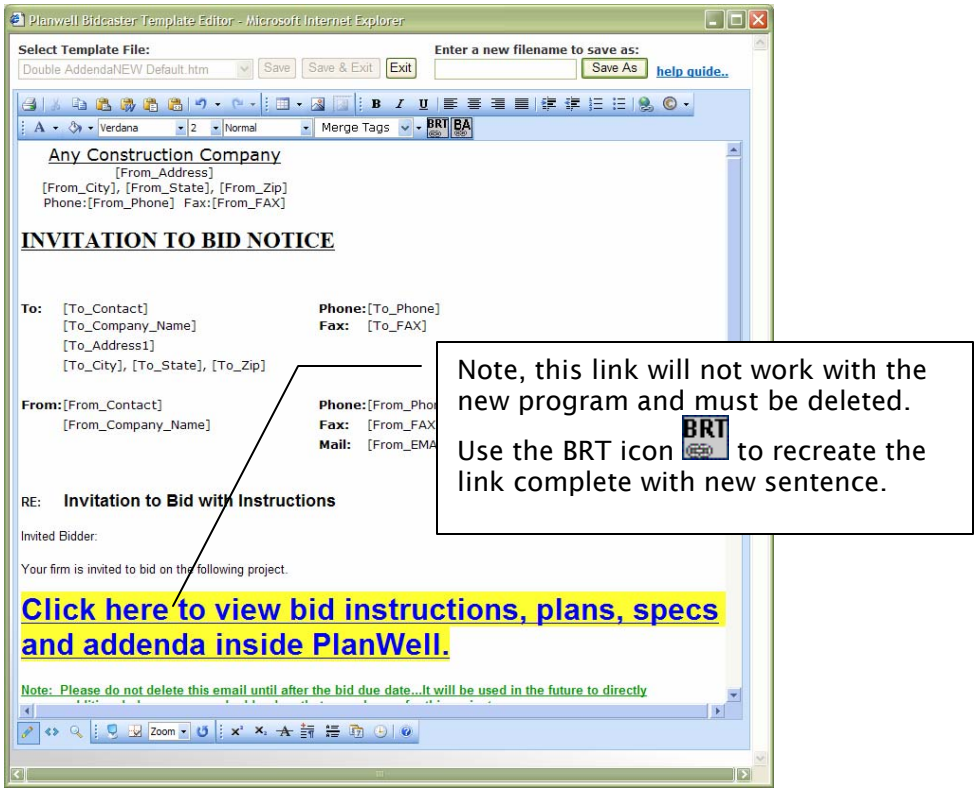


This will open a blank screen as follows, ref. next screen.

→ Place a blinking cursor in the upper left corner of the template.


Planwell Bidcaster Template Editor - Microsoft Internet Explorer
Select Template File:
Double AddendaNEW Default.htm
Save
Save & Exit
Exit
Enter a new filename to save as:
Save As
help guide..
Merge Tags
Step 2: Click on paste icon
Step 1: Place a blinking cursor in upper left corner of screen

The old BidCaster template is now pasted into the new editor, ref. below.


Planwell Bidcaster Template Editor - Microsoft Internet Explorer
Select Template File:
Double AddendaNEW Default.htm
Save
Save & Exit
Exit
Enter a new filename to save as:
Save As
help guide..
Merge Tags
Any Construction Company
[From_Address]
[From_City], [From_State], [From_Zip]
Phone:[From_Phone] Fax:[From_FAX]
INVITATION TO BID NOTICE
To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone:[To_Phone]
Fax: [To_FAX]
From:[From_Contact]
[From_Company_Name]
RE: Invitation to Bid with Instructions
Invited Bidder:
Your firm is invited to bid on the following project.
Click here to view bid instructions, plans, specs and addenda inside PlanWell.
Note: Please do not delete this email until after the bid due date...It will be used in the future to directly
Note, this link will not work with the new program and must be deleted.
Use the BRT icon to recreate the link complete with new sentence.

Some re-formatting is typically necessary. Proceed to use formatting tools to accomplish corrections as required.

It is important to note that hyperlinks will not transfer when pasting. In this case it is the BRT link

that needs to be re-established since this example reflects a Broadcast template that ties to a Response template, i.e., the Double Template Approach described earlier in this chapter.

→ Enter the required BRT link.
→ Modify the BRT link sentence as desired (optional).
→ then save the document before closing.

If you do not want to take time now to learn about **ITB Templates** and wish to use pre-defined templates provided with the program, please skip this section and proceed to the next required step, **Merge Tags & Critical Links.**

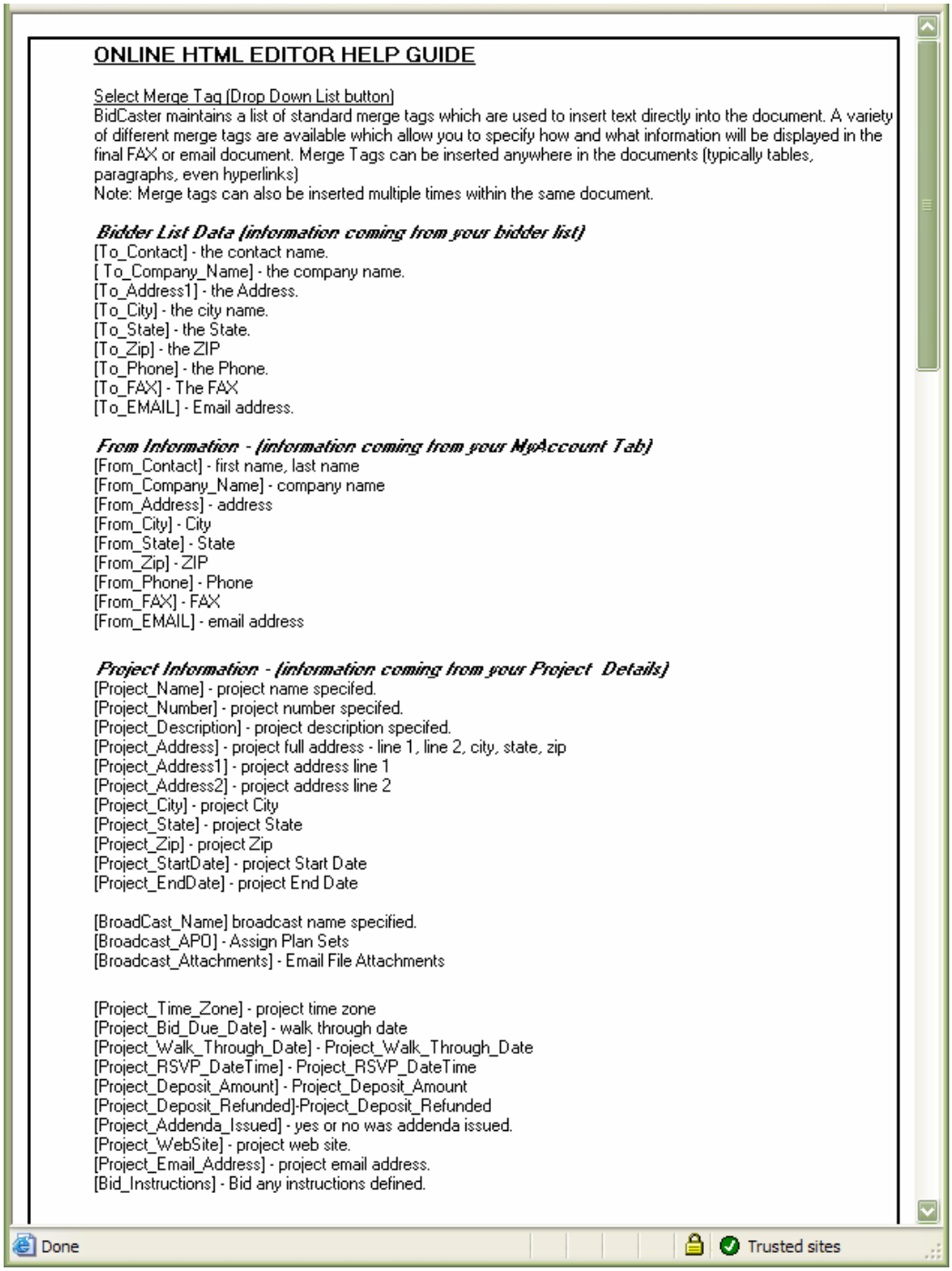
U. The Template Toolbar

During an edit session, the toolbar (below) is displayed above the actual template. The toolbar consists of standard formatting tools plus several BidCaster™-specific tools for adding merge tags (merge fields) and inserting logos. Understanding which toolbar icons accomplish which tasks is critical to becoming proficient at using the template editor.

Reference the Template Toolbar (partial screen) below.

Reference General Buttons as shown below. Please note, not all general buttons listed have been activated since they are not applicable to BidCaster.

GENERAL BUTTONS		
	Design button - Switches r.a.d.editor into Design Mode.	-
	HTML button - Switches r.a.d.editor into HTML Mode.	-
	Preview button - Switches r.a.d.editor into Preview Mode.	-
	Toggle Screen Mode - Switches r.a.d.editor into Full Screen Mode.	-
	Show/Hide Border - Shows or hides borders around tables in the content area.	-
Zoom	Zoom - Changes the level of text magnification.	-
	Module Manager - Activates /Deactivates modules from a drop-down list of available modules.	-
	Toggle Docking - Docks all floating toolbars to their respective docking areas.	-
	Repeat Last Command - A short-cut to repeat the last action performed.	-
	Find and Replace - Find (and replaces) text in the editor's content area.	Ctrl+F
	Print button - Prints the contents of the r.a.d.editor or the whole web page.	Ctrl+P
	Spell button - Launches the spellchecker.	-
	Cut button - Cuts the selected content and copies it to the clipboard.	Ctrl+X
	Copy button - Copies the selected content to the clipboard.	Ctrl+C
	Paste button - Pastes the copied content from the clipboard into the editor.	Ctrl+Y
	Paste from Word button - Pastes content copied from Word and removes the web-unfriendly tags.	-
	Paste from Word cleaning fonts and sizes button - cleans all Word-specific tags and removes font names and text sizes.	-
	Paste Plain Text button - Pastes plain text (no formatting) into the editor.	-
	Paste as HTML button - Pastes HTML code in the content area and keeps all the HTML tags.	-
	Undo button - Undoes the last action.	Ctrl+Z
	Redo button - Redoes/Repeats the last action, which has been undone.	Ctrl+Y
	Format Stripper button - Removes custom or all formatting from selected text.	-
	Quick Help - Launches the Quick Help you are currently viewing.	-
	About Dialog - Shows the current version and credentials of r.a.d.editor.	-
INSERT AND MANAGE LINKS, TABLES, SPECIAL CHARACTERS, IMAGES and MEDIA		
	Image Manager button - Inserts an image from a predefined image folder(s).	Ctrl+G
	Absolute Object Position button - Sets an absolute position of an object (free move).	-
	Insert Table button - Inserts a table in the r.a.d.editor.	-
	Toggle Table Borders - Toggles borders of all tables within the editor.	-
Merge Tags	Insert Snippet - Inserts pre-defined code snippets.	-
	Insert Form Element - Inserts a form element from a drop-down list with available elements.	-
	Insert Date button - Inserts current date.	-
	Insert Time button - Inserts current time.	-
	Flash Manager button - Inserts a Flash animation and lets you set its properties.	-



ONLINE HTML EDITOR HELP GUIDE

Select Merge Tag (Drop Down List button)
BidCaster maintains a list of standard merge tags which are used to insert text directly into the document. A variety of different merge tags are available which allow you to specify how and what information will be displayed in the final FAX or email document. Merge Tags can be inserted anywhere in the documents (typically tables, paragraphs, even hyperlinks)
Note: Merge tags can also be inserted multiple times within the same document.

Bidder List Data (information coming from your bidder list)
[To_Contact] - the contact name.
[To_Company_Name] - the company name.
[To_Address1] - the Address.
[To_City] - the city name.
[To_State] - the State.
[To_Zip] - the ZIP
[To_Phone] - the Phone.
[To_FAX] - The FAX
[To_EMAIL] - Email address.

From Information - (information coming from your MyAccount Tab)
[From_Contact] - first name, last name
[From_Company_Name] - company name
[From_Address] - address
[From_City] - City
[From_State] - State
[From_Zip] - ZIP
[From_Phone] - Phone
[From_FAX] - FAX
[From_EMAIL] - email address

Project Information - (information coming from your Project Details)
[Project_Name] - project name specifed.
[Project_Number] - project number specifed.
[Project_Description] - project description specifed.
[Project_Address] - project full address - line 1, line 2, city, state, zip
[Project_Address1] - project address line 1
[Project_Address2] - project address line 2
[Project_City] - project City
[Project_State] - project State
[Project_Zip] - project Zip
[Project_StartDate] - project Start Date
[Project_EndDate] - project End Date

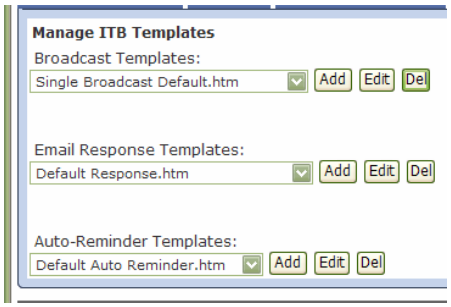
[BroadCast_Name] broadcast name specified.
[Broadcast_APO] - Assign Plan Sets
[Broadcast_Attachments] - Email File Attachments

[Project_Time_Zone] - project time zone
[Project_Bid_Due_Date] - walk through date
[Project_Walk_Through_Date] - Project_Walk_Through_Date
[Project_RSVP_DateTime] - Project_RSVP_DateTime
[Project_Deposit_Amount] - Project_Deposit_Amount
[Project_Deposit_Refunded]-Project_Deposit_Refunded
[Project_Addenda_Issued] - yes or no was addenda issued.
[Project_WebSite] - project web site.
[Project_Email_Address] - project email address.
[Bid_Instructions] - Bid any instructions defined.

Done | Trusted sites

The next task is to select and modify an **ITB Template** to be emailed to a select group of Bidders.

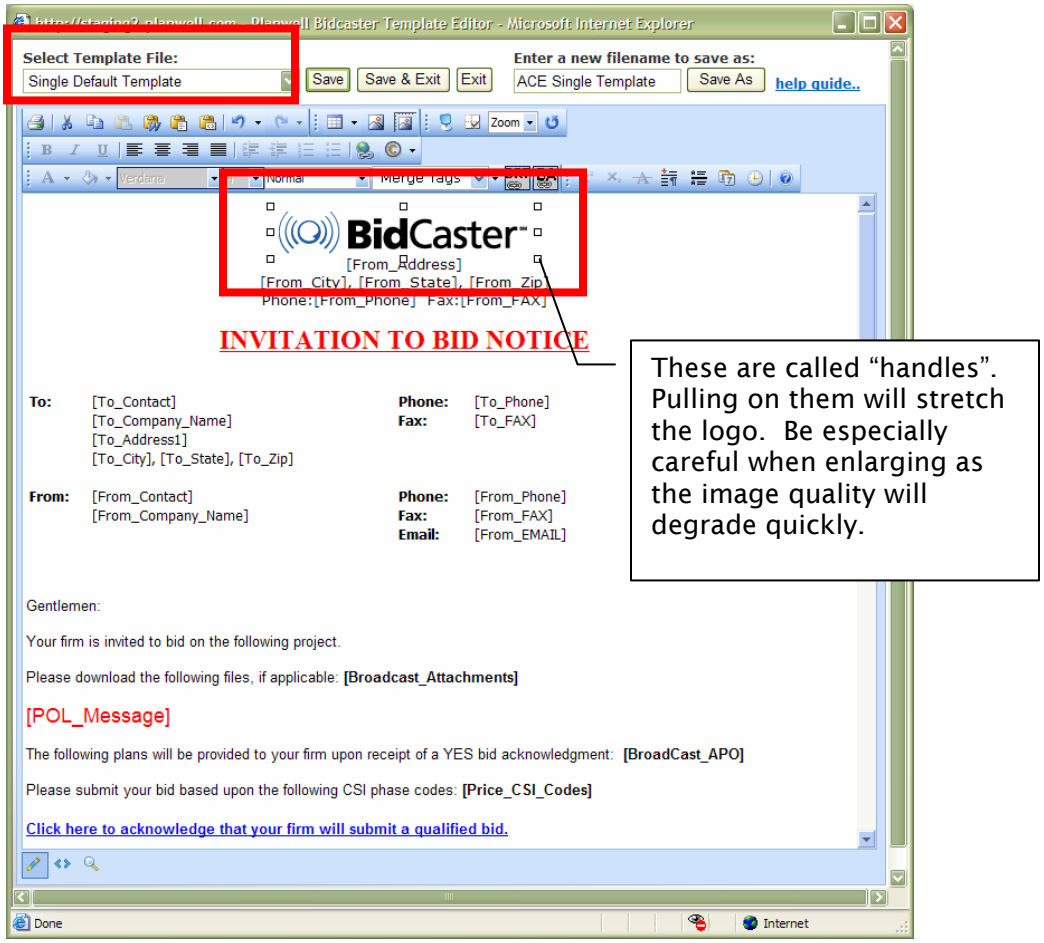
Three types of Templates are available for use, ref. next screen below…all are 100% customizable. For purposes of this guide, we'll use standard default templates that are pre-defined and come with each user account.



1. Broadcast templates (can be faxed and emailed).
2. Response templates (can only be emailed and link directly to Broadcast templates).
3. Auto-Reminder templates (often called RSVP templates…can be emailed and faxed).

→ Locate and open the **Single Default Template**. This template reflects a comprehensive set of common merge tags and links to send to Bidders and is the only template you will use for the remainder of this guide.

→ Place your cursor over the existing **BidCaster logo** and click to select it, ref. screen below. "Handles" will appear around the logo once selected.

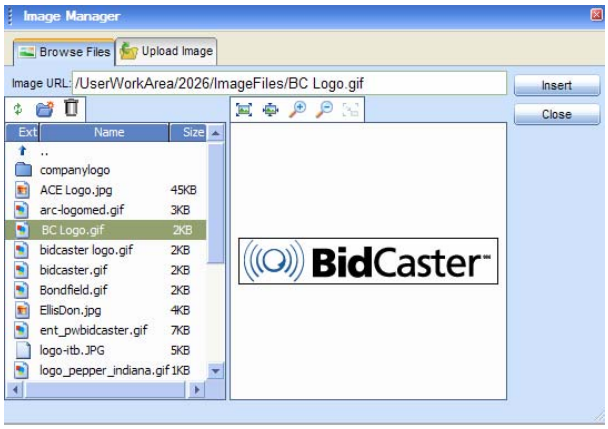

Select Template File:
Single Default Template
Save
Save & Exit
Exit
Enter a new filename to save as:
ACE Single Template
Save As
help guide..
BidCaster
[From_Address]
[From_City], [From_State], [From_Zip]
Phone:[From_Phone] Fax:[From_FAX]
INVITATION TO BID NOTICE
To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone: [To_Phone]
Fax: [To_FAX]
From: [From_Contact]
[From_Company_Name]
Phone: [From_Phone]
Fax: [From_FAX]
Email: [From_EMAIL]
Gentlemen:
Your firm is invited to bid on the following project.
Please download the following files, if applicable: [Broadcast_Attachments]
[POL_Message]
The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: [BroadCast_APO]
Please submit your bid based upon the following CSI phase codes: [Price_CSI_Codes]
Click here to acknowledge that your firm will submit a qualified bid.
These are called "handles". Pulling on them will stretch the logo. Be especially careful when enlarging as the image quality will degrade quickly.

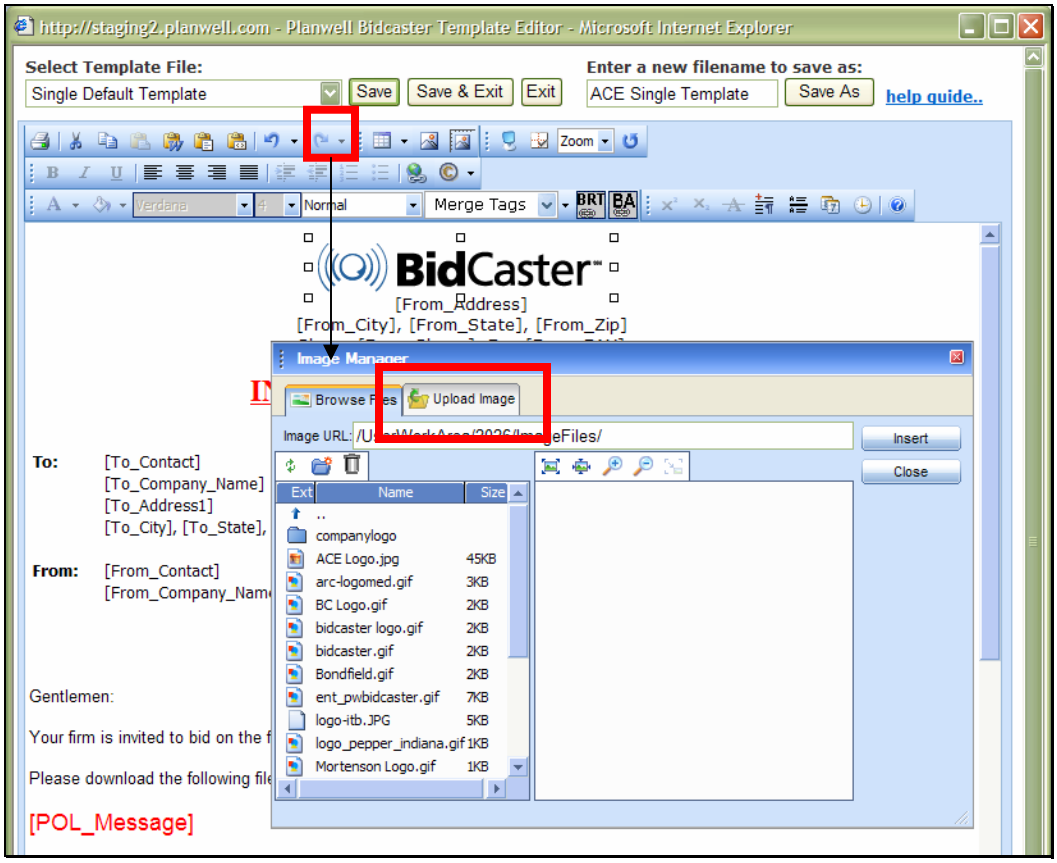
V. Insert a Company Logo

The first step is to replace the existing BidCaster logo with your company logo or type in your Company name if a digital logo is not available. Note, only gif and jpg files can be used within BidCaster Templates.

→ Click on the **Image Manager** icon in the toolbar.

This opens the **Image Manager** where logos can be imported and inserted.





Assuming a company logo resides in your hard drive, proceed to locate it and upload into BidCaster as follows:

→ Click on the **Upload Image** tab.
→ Click on the **Browse** button.

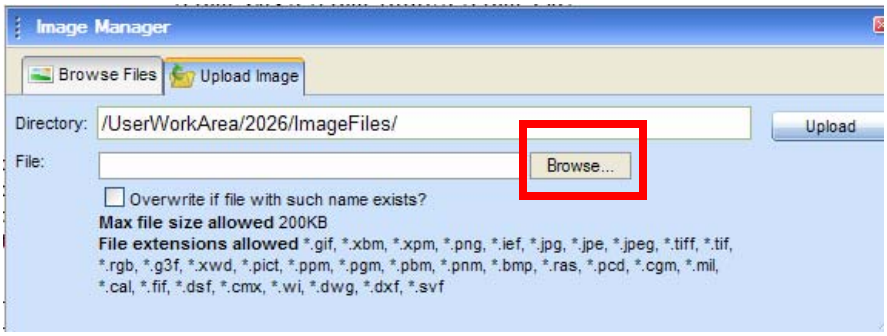
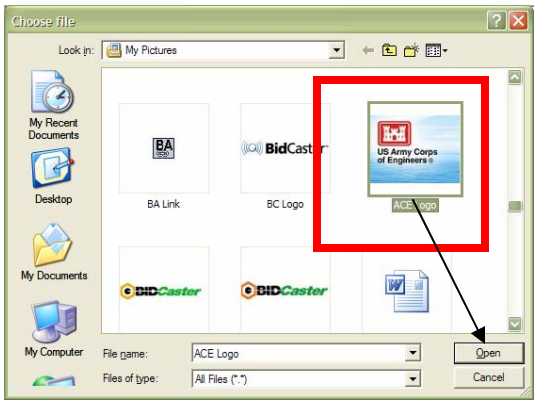
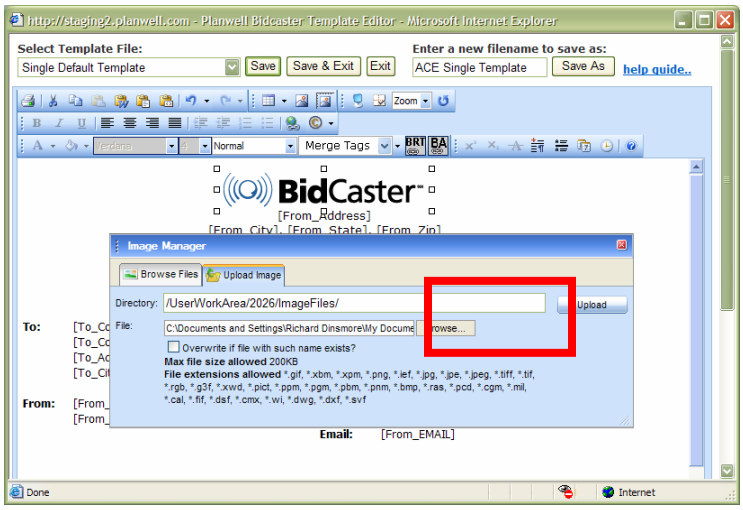


Image Manager
Browse Files
Upload Image
Directory:
/UserWorkArea/2026/ImageFiles/
Upload
File:
Browse...
Overwrite if file with such name exists?
Max file size allowed 200KB
File extensions allowed *.gif, *.xbm, *.xpm, *.png, *.ief, *.jpg, *.jpe, *.jpeg, *.tiff, *.tif, *.rgb, *.g3f, *.xwd, *.pict, *.ppm, *.pgm, *.pbm, *.pnm, *.bmp, *.ras, *.pcd, *.cgm, *.mil, *.cal, *.fif, *.dsf, *.cmx, *.wi, *.dwg, *.dxf, *.svf

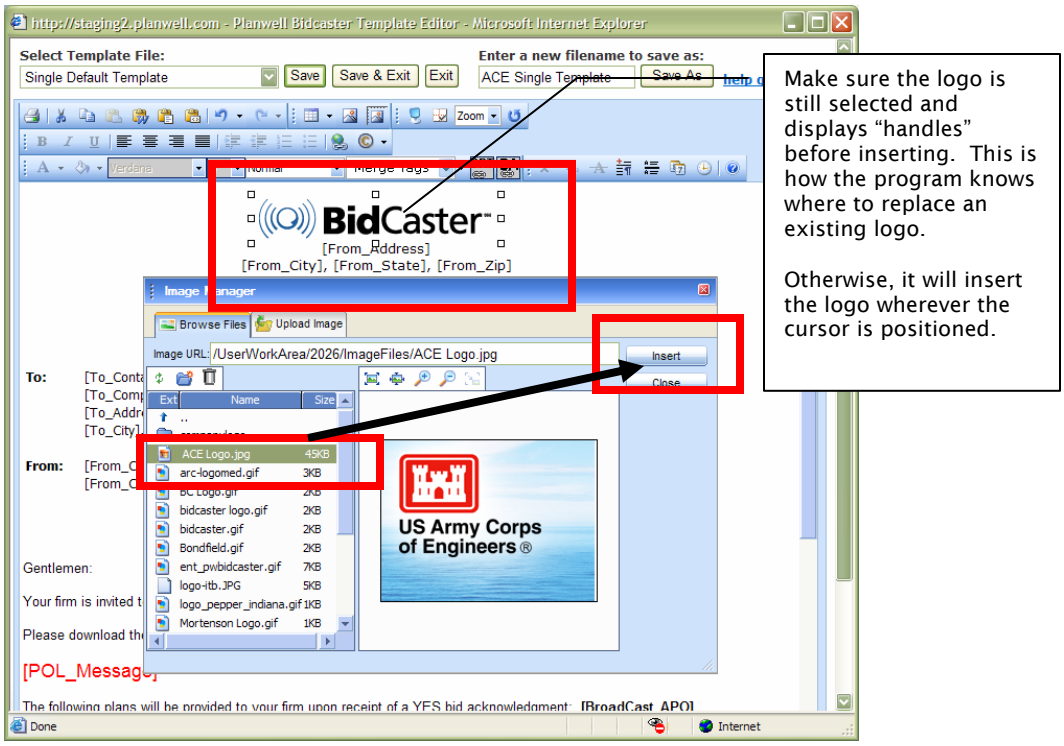
Locate your company logo. We are using the **US Army Corps of Engineers** logo only for training purposes.



→ Click on the file to select it.
→ Click **Open**.
→ Click **Upload**, ref. next screen.



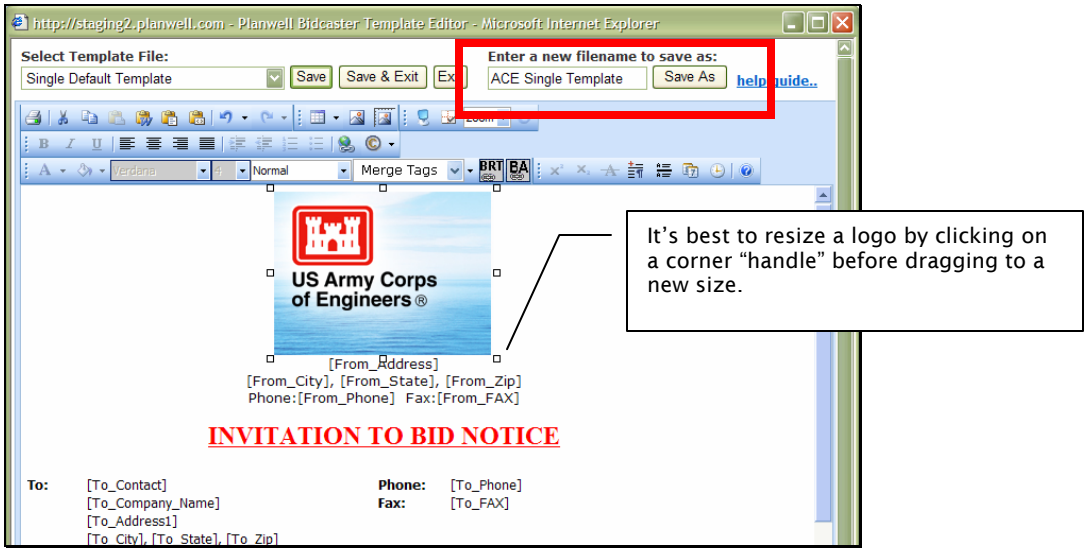
→ Ensure the BidCaster Logo is still selected (displays “handles”)
→ Locate and click to select your company logo from the list.
→ Click on **Insert**.


Make sure the logo is still selected and displays "handles" before inserting. This is how the program knows where to replace an existing logo.
Otherwise, it will insert the logo wherever the cursor is positioned.

The screen will refresh and display the newly inserted logo, ref. screen on next page.

If the logo needs adjusting, be careful…especially when enlarging as it will "pixelize" immediately, i.e, quality will deteriorate. It is therefore better to reduce a logo than enlarge. Fortunately, you'll find most logos are sized correctly when inserted, especially those captured from a website. To adjust:

- → Click on the logo to display handles.
- → Place the cursor over one of the "handles" and drag while holding down the left mouse button. Be careful to maintain proportionality…it may take some practice.



→ Enter the new file name
→ Click **Save As**.

W. Merge Tags & Creating Critical Links (in Templates)

If you are familiar with the concept of mail merge, you may elect to skip over this section to the next required step, **Starting a New Broadcast**. If not, we recommend reading and fully understanding the following before proceeding.

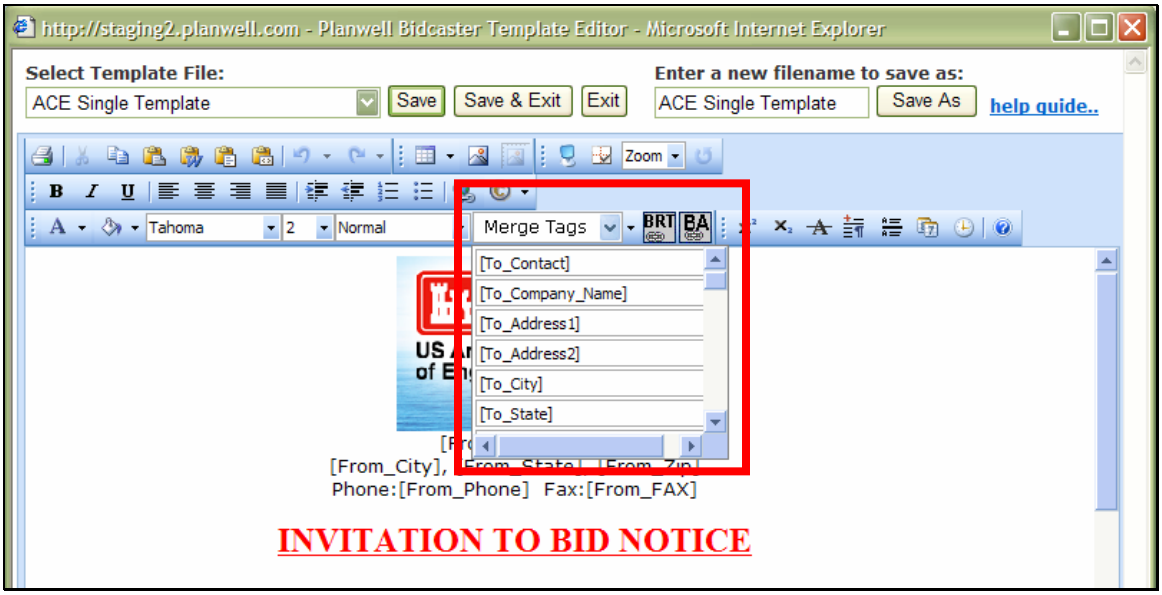
BidCaster uses the concept of mail merge. It ensures that each Bidder receives an individualized notice with individualized information. This is accomplished using "merge tags" or simply referred as "tags". Merge tags appear as bracketed words, ref. examples on the next page:

[To_Contact], [To_Company_Name], [To_Address1], etc.

All merge tags used in BidCaster are listed in a drop down menu as shown below.

X. How Merge Tags Work

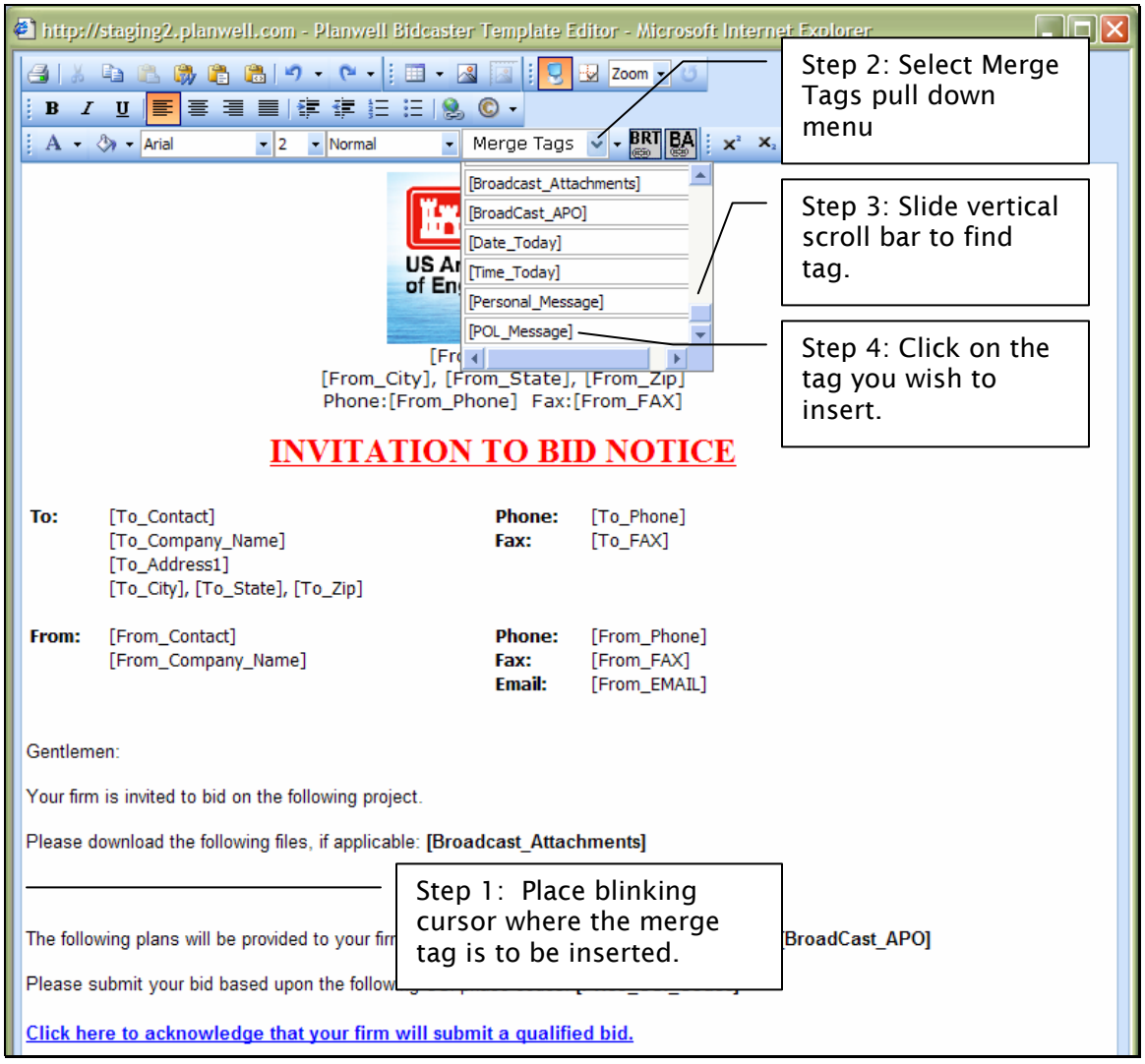
When a notice is sent to Bidders, "tags" will populate with data drawn from the Address Book and from Project Details (more about that later). This ensures that each recipient Bidder receives a notice tailored specifically for them.

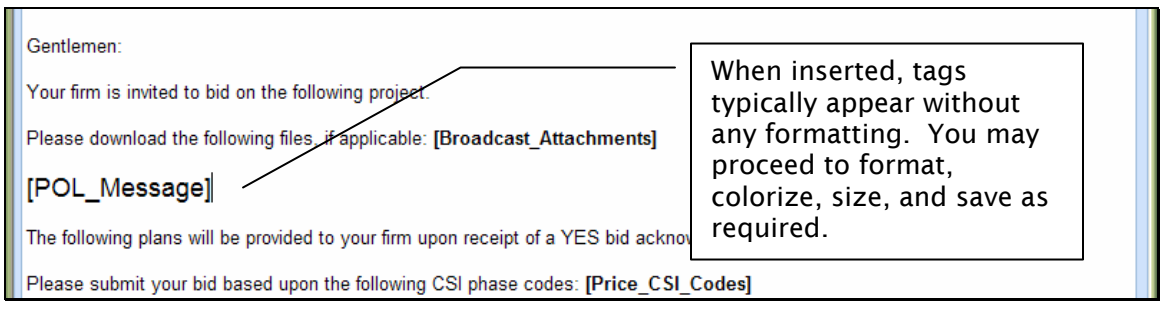


How are merge tags inserted into a template?

→ Place a blinking cursor where a merge tag is to be entered,
→ click on the **Merge Tags** pull down menu (down arrow),
→ Use the vertical scroll bar to locate the specific tag,
→ then click to select it.

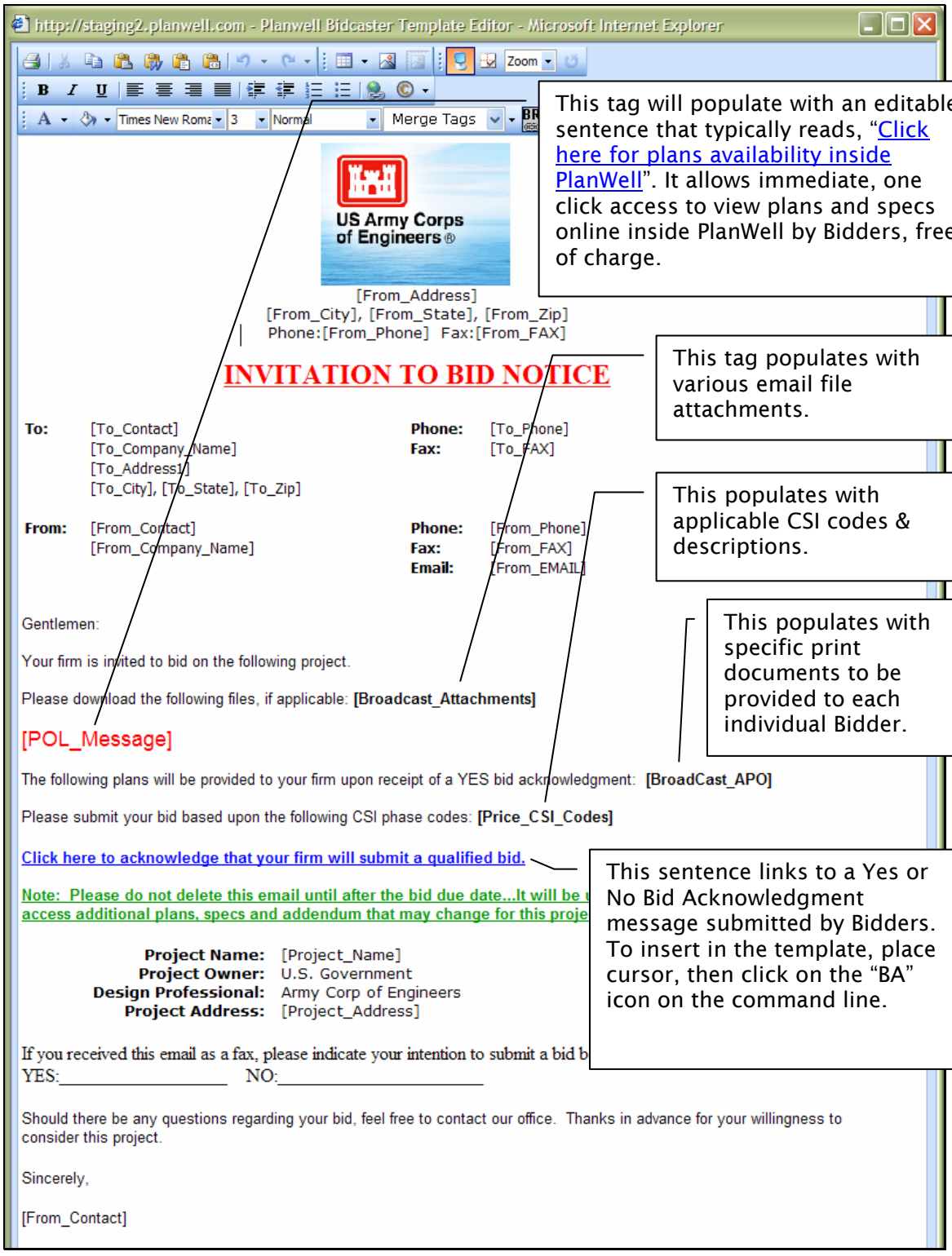
Once selected, it will be inserted into the template where the blinking cursor was positioned, ref. following example.

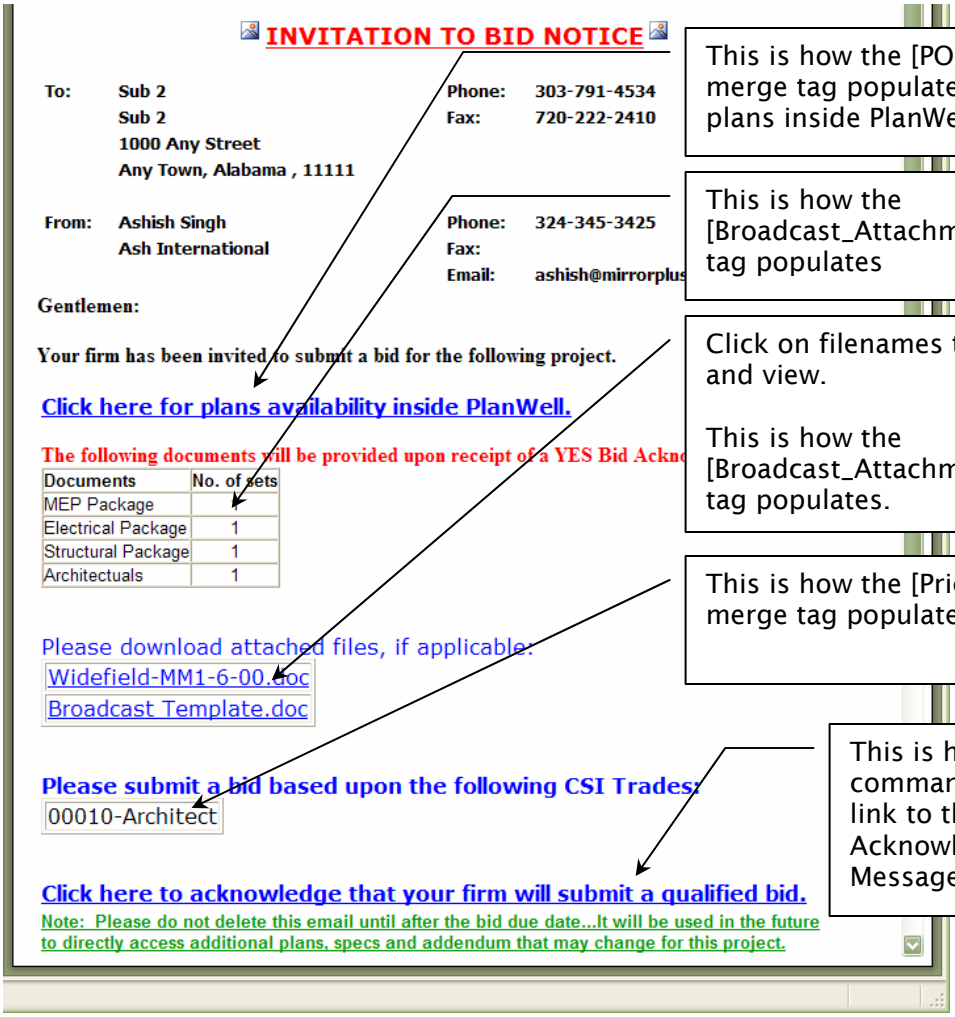



Gentlemen:
Your firm is invited to bid on the following project.
Please download the following files, if applicable: [Broadcast_Attachments]
[POL_Message]
The following plans will be provided to your firm upon receipt of a YES bid
Please submit your bid based upon the following CSI phase codes: [Price_CSI_Codes]
When inserted, tags typically appear without any formatting. You may proceed to format, colorize, size, and save as required.

The revised template now displays, ref. next screen.

Notice how each link and merge tag operates according to specific notes provided.

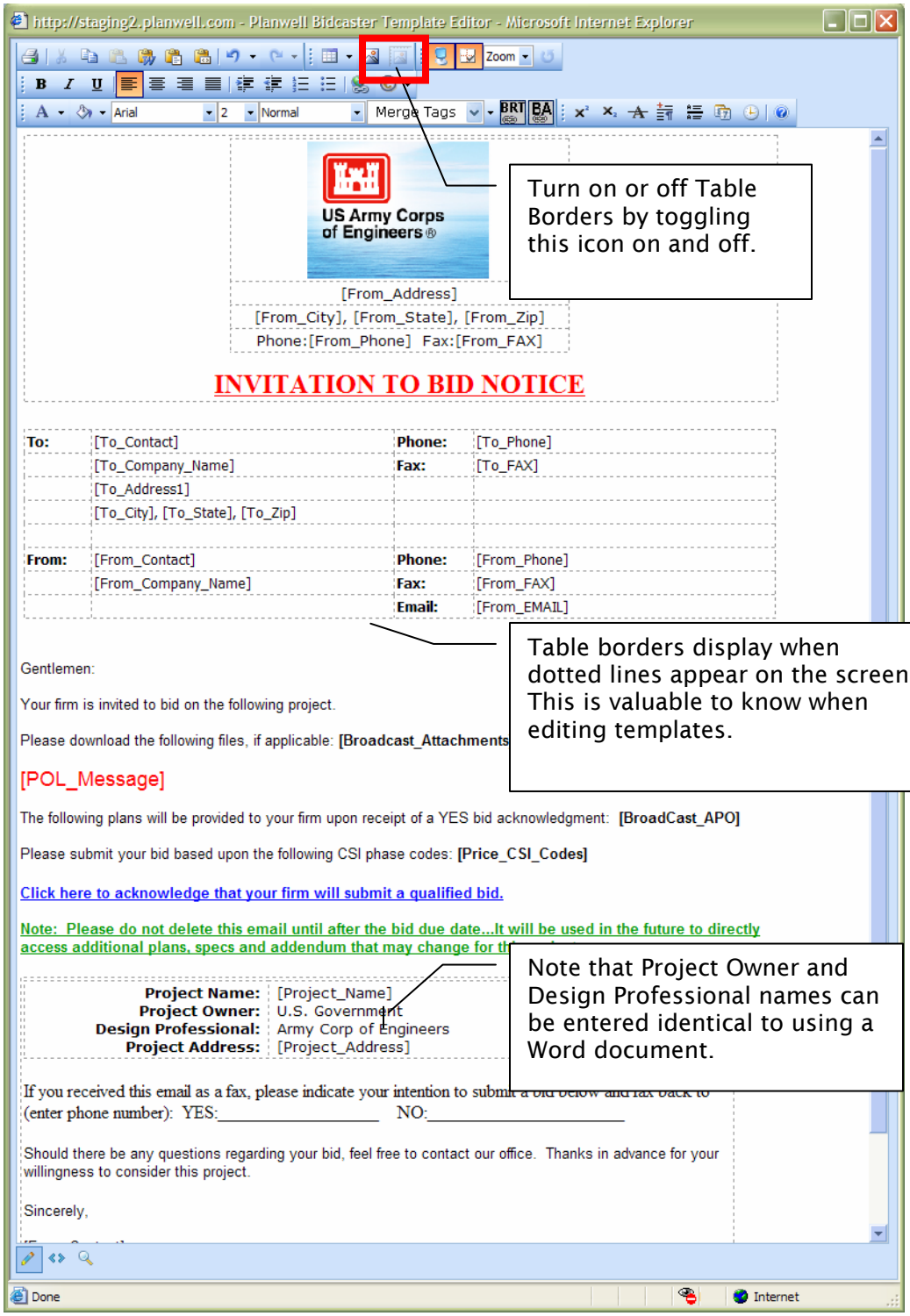

http://staging2.planwell.com - Planwell Bidcaster Template Editor - Microsoft Internet Explorer
Merge Tags
US Army Corps of Engineers
[From_Address]
[From_City], [From_State], [From_Zip]
Phone:[From_Phone] Fax:[From_FAX]
INVITATION TO BID NOTICE
To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone: [To_Phone]
Fax: [To_FAX]
From: [From_Contact]
[From_Company_Name]
Phone: [From_Phone]
Fax: [From_FAX]
Email: [From_EMAIL]
Gentlemen:
Your firm is invited to bid on the following project.
Please download the following files, if applicable: [Broadcast_Attachments]
[POL_Message]
The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: [BroadCast_APO]
Please submit your bid based upon the following CSI phase codes: [Price_CSI_Codes]
Click here to acknowledge that your firm will submit a qualified bid.
Project Name: [Project_Name]
Project Owner: U.S. Government
Design Professional: Army Corp of Engineers
Project Address: [Project_Address]
If you received this email as a fax, please indicate your intention to submit a bid b
YES:_____ NO:_____
Should there be any questions regarding your bid, feel free to contact our office. Thanks in advance for your willingness to consider this project.
Sincerely,
[From_Contact]
This tag will populate with an editable sentence that typically reads, "Click here for plans availability inside PlanWell". It allows immediate, one click access to view plans and specs online inside PlanWell by Bidders, free of charge.
This tag populates with various email file attachments.
This populates with applicable CSI codes & descriptions.
This populates with specific print documents to be provided to each individual Bidder.
This sentence links to a Yes or No Bid Acknowledgment message submitted by Bidders. To insert in the template, place cursor, then click on the "BA" icon on the command line.


INVITATION TO BID NOTICE
To: Sub 2
Sub 2
1000 Any Street
Any Town, Alabama , 11111
Phone: 303-791-4534
Fax: 720-222-2410
From: Ashish Singh
Ash International
Phone: 324-345-3425
Fax:
Email: ashish@mirrorplus
Gentlemen:
Your firm has been invited to submit a bid for the following project.
Click here for plans availability inside PlanWell.
The following documents will be provided upon receipt of a YES Bid Ackn
Documents
No. of sets
MEP Package
Electrical Package 1
Structural Package 1
Architectuals 1
Please download attached files, if applicable:
Widefield-MM1-6-00.doc
Broadcast Template.doc
Please submit a bid based upon the following CSI Trades:
00010-Architect
Click here to acknowledge that your firm will submit a qualified bid.
Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change for this project.
This is how the [POL_Message] merge tag populates a link to view plans inside PlanWell.
This is how the [Broadcast_Attachments] merge tag populates
Click on filenames to download and view.
This is how the [Broadcast_Attachment] merge tag populates.
This is how the [Price_CSI_Codes] merge tag populates
This is how the BA link command populates a link to the Bid Acknowledgment Message.

It's important to note that any merge tag or sentence can be deleted if it is not required for a broadcast. Delete just as you would in a Word document.

Y. Displaying Tables

BidCaster™ templates use "tables" to better organize and display information. When editing templates, it's strongly recommended to turn on (view) Table Borders by clicking on the Table Borders icon in order to know where "tables" exist in the template. Tables are also used inside Microsoft Word and can be pasted directly into the HTML editor. Reference the next screen for an example of what a template looks like with borders turned on:


http://staging2.planwell.com - Planwell Bidcaster Template Editor - Microsoft Internet Explorer
Turn on or off Table Borders by toggling this icon on and off.
US Army Corps of Engineers
[From_Address]
[From_City], [From_State], [From_Zip]
Phone:[From_Phone] Fax:[From_FAX]
INVITATION TO BID NOTICE
To: [To_Contact] Phone: [To_Phone]
[To_Company_Name] Fax: [To_FAX]
[To_Address1]
[To_City], [To_State], [To_Zip]
From: [From_Contact] Phone: [From_Phone]
[From_Company_Name] Fax: [From_FAX]
Email: [From_EMAIL]
Table borders display when dotted lines appear on the screen. This is valuable to know when editing templates.
Gentlemen:
Your firm is invited to bid on the following project.
Please download the following files, if applicable: [Broadcast_Attachments
[POL_Message]
The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: [BroadCast_APO]
Please submit your bid based upon the following CSI phase codes: [Price_CSI_Codes]
Click here to acknowledge that your firm will submit a qualified bid.
Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change for th
Note that Project Owner and Design Professional names can be entered identical to using a Word document.
Project Name: [Project_Name]
Project Owner: U.S. Government
Design Professional: Army Corp of Engineers
Project Address: [Project_Address]
If you received this email as a fax, please indicate your intention to submit a bid below and fax back to (enter phone number): YES:_____ NO:_____
Should there be any questions regarding your bid, feel free to contact our office. Thanks in advance for your willingness to consider this project.
Sincerely,
Done
Internet

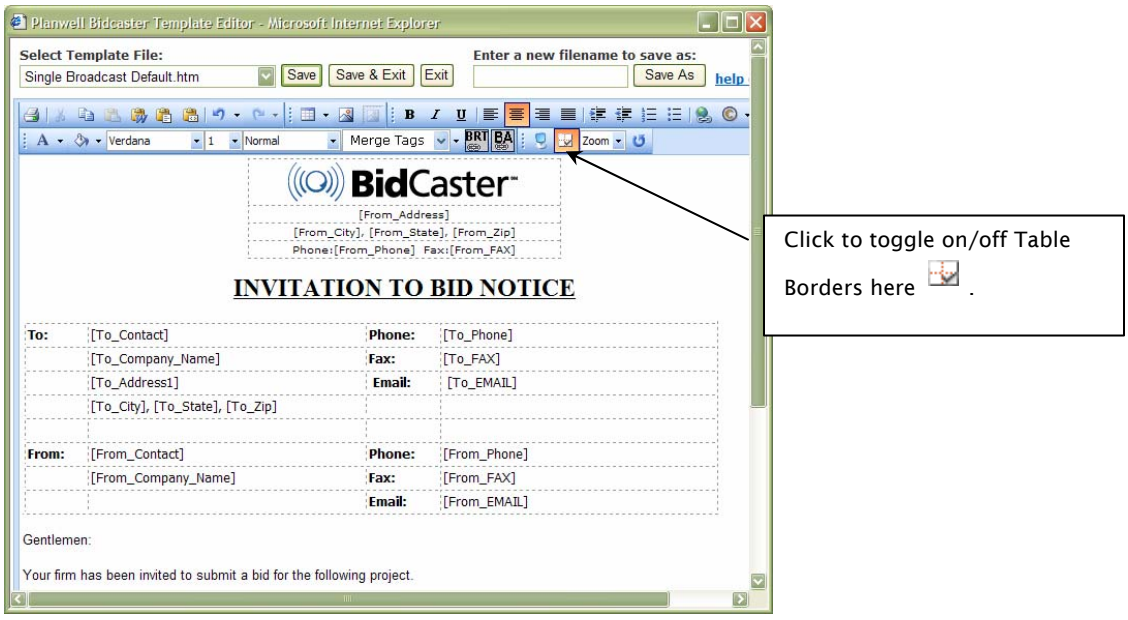
After modifications are made, there is no need to turn off **Table Borders**…the program will automatically perform this task when the template is saved.

Finally, once standard templates for your company are created, they can be used repeatedly on numerous broadcasts. You'll find pre-defined templates are provided which can also be modified and saved for later use.

Z. Steps for Formatting Text

The steps for formatting text (i.e., using bold, underline, italics, font type, font size, font color and background color) or for cutting/copying text are as follows:

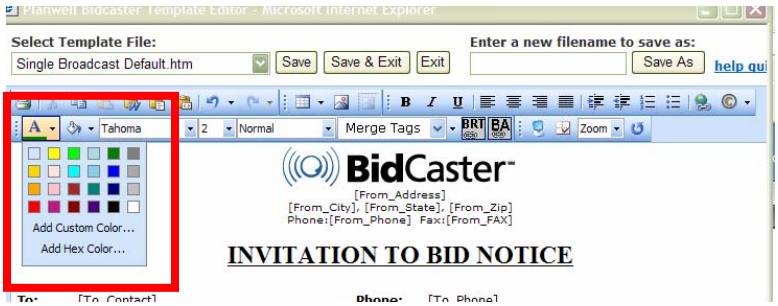
- → Highlight the text you wish to format, cut or copy.
- → Press the appropriate icon in the toolbar and follow the prompts.



Tables can be used to center information on the screen, arrange data in columns with very specific formatting requirements and control how text wraps. Tables can also be nested within tables for even greater control. The next sections will cover editing BidCaster™ templates in great detail. Content Providers can chose to use the default BidCaster™ templates or generate their own templates with or without tables for that matter.

AA. Changing Font Colors

- → To change the color of text in the template, first highlight the text to be changed then click the Change Font Color icon.. The following color palette will be displayed



→ Select a color by clicking on it then verify color and shade are correct. You may also want to bold the text to further emphasize it.

BB. Font Style and Size

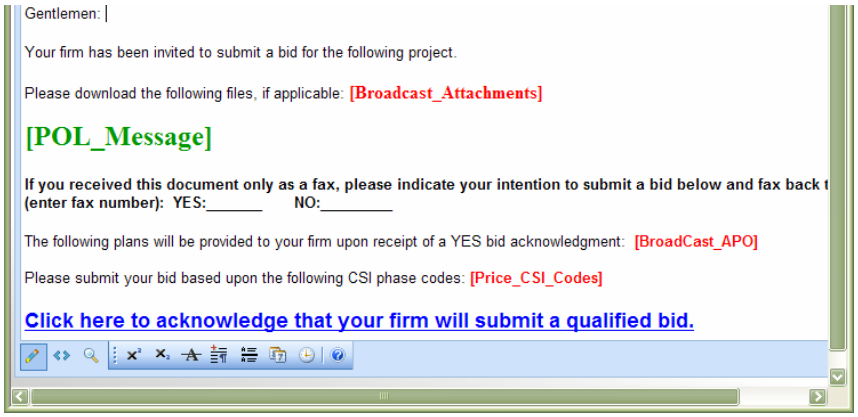
For more dramatic templates, use these pull-down menus (in combination with tools above, i.e., change font color) to change the template's look and feel. Under the pull-down menu for each category, the options are:

Style Menu	Font Menu	Size Menu
Normal (normal text)	Arial	1 – 8pt
Heading 1	Arial Black	2 – 10pt
Heading 2	Arial Narrow	3 – 12pt

Style Menu (cont.)	Font Menu (cont.)	Size Menu (cont.)
Heading 3	Comic Sans MS	4 – 14pt
Heading 4	Courier New	5 – 18pt
Heading 5	System	6 – 24pt
Address	Tahoma	7 – 36pt
Formatted	Time New Roman	
Definition Term	Vendana	

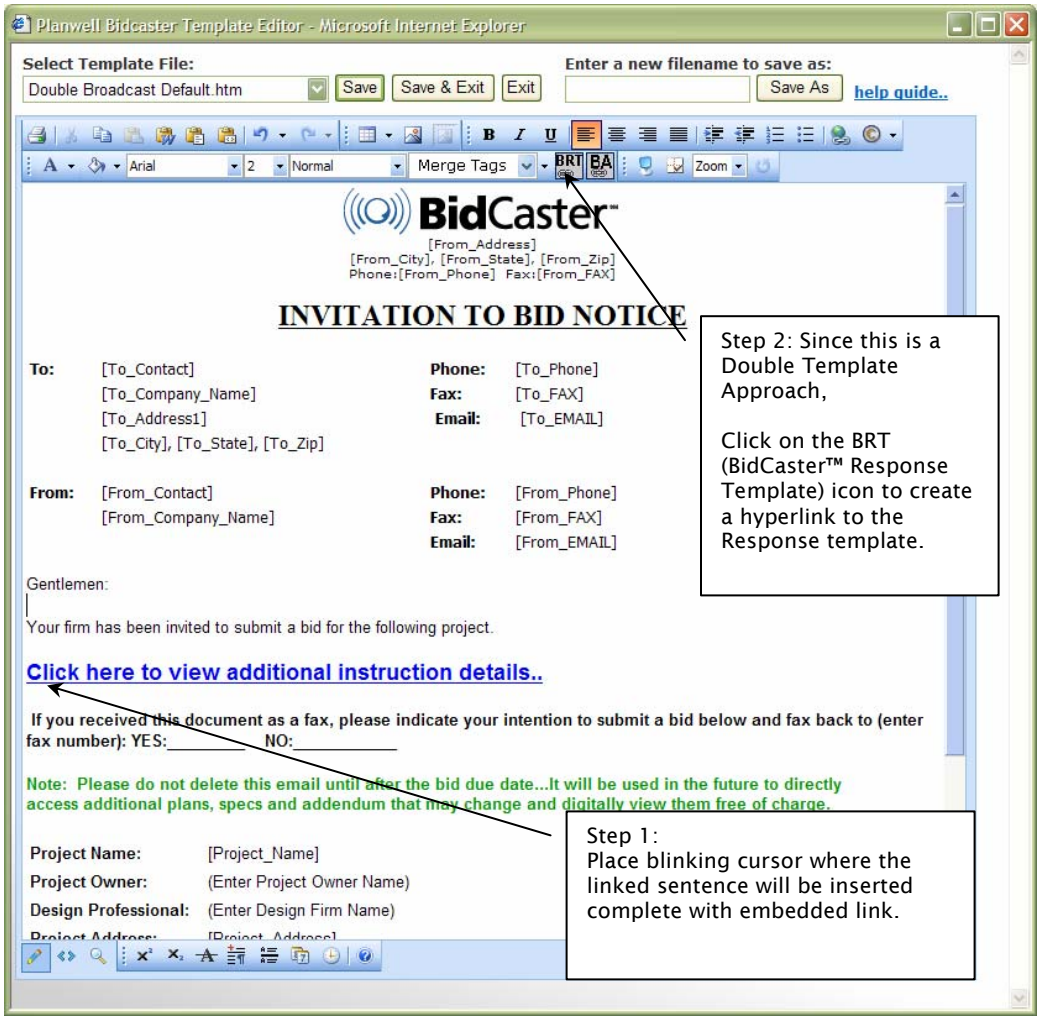
→ To change the style, font or point size for text, highlight the text first then select the desired affect from the corresponding pull-down menu.

The following screen shows examples of several font styles:


Gentlemen:
Your firm has been invited to submit a bid for the following project.
Please download the following files, if applicable: [Broadcast_Attachments]
[POL_Message]
If you received this document only as a fax, please indicate your intention to submit a bid below and fax back t
(enter fax number): YES:_____ NO:_____
The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: [BroadCast_APO]
Please submit your bid based upon the following CSI phase codes: [Price_CSI_Codes]
Click here to acknowledge that your firm will submit a qualified bid.

CC. Creating Broadcast Template Hyperlinks

Each broadcast template must have a hyperlink to the corresponding response template – for every ITB broadcast.


Planwell Bidcaster Template Editor - Microsoft Internet Explorer
Select Template File:
Double Broadcast Default.htm
Save
Save & Exit
Exit
Enter a new filename to save as:
Save As
help guide..
Merge Tags
BRT
BA
BidCaster
[From_Address]
[From_City], [From_State], [From_Zip]
Phone:[From_Phone] Fax:[From_FAX]
INVITATION TO BID NOTICE
To: [To_Contact]
[To_Company_Name]
[To_Address1]
[To_City], [To_State], [To_Zip]
Phone: [To_Phone]
Fax: [To_FAX]
Email: [To_EMAIL]
From: [From_Contact]
[From_Company_Name]
Phone: [From_Phone]
Fax: [From_FAX]
Email: [From_EMAIL]
Gentlemen:
Your firm has been invited to submit a bid for the following project.
Click here to view additional instruction details..
If you received this document as a fax, please indicate your intention to submit a bid below and fax back to (enter fax number): YES:_____ NO:_____
Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change and digitally view them free of charge.
Project Name: [Project_Name]
Project Owner: (Enter Project Owner Name)
Design Professional: (Enter Design Firm Name)
Step 2: Since this is a Double Template Approach,
Click on the BRT (BidCaster™ Response Template) icon to create a hyperlink to the Response template.
Step 1:
Place blinking cursor where the linked sentence will be inserted complete with embedded link.

When Bidders click on this link, they access the response message (template). If this links doesn't work for any reason or was inadvertently deleted, here are the steps for re-creating the link:

DD. Steps to Creating the BidCaster™ Response Template (BRT) Hyperlink:

→ Place blinking cursor where the linked sentence will automatically be inserted, complete with embedded link.

→ Click the BRT link icon on the toolbar

The sentence, "Click here to view additional instruction details.." now appears as a link.

Remember: The only purpose of a BRT link is to link a Broadcast template to a Response template, therefore it applies only when using a Double Template approach. Conversely, the BRT link is never used with a Single Template Approach since it doesn't have to link to a Response template.

EE. Best Practices/Tips & Shortcuts

- As a rule, it's best to create, edit and delete templates from the **My Account** screen.
- It's also recommended to use an existing default template, rename it and save as a new template. This way, you build on templates which have already been created for projects.
- Whenever editing templates, be sure to save changes when exiting.
- Within a table, don't mix fonts or font sizes as this will cause formatting problems.
- Keep it simple. Use few headings, a normal form style, and change the font color along with bolding to customize your template. You'll be surprised how much can be done.
- For fax broadcasts, make sure font sizes are large enough to be legible when printed.
- Be sure to add your company logo to every template.
- Always print your templates first before doing a live broadcast to verify length, look and feel, etc.
- Be sure to save templates when making changes.
- When making changes to a default template, it's recommended you change the template name also.
- It's recommended you change the font style, font size, bold the text and perhaps even change the font color to make hyperlinks standout within a template.

(End of Chapter 4)

Chapter 5 - Broadcast Steps

A. Overview

Before discussing broadcast steps in detail, a simple overview of the process is in order. A broadcast can be directed to email addresses, fax numbers or, a combination of both. Prior to actually doing a broadcast, the following must be accomplished:

a. Import an Address Book database into BidCaster™
b. Uploaded company logo(s), files etc. into BidCaster™
c. Incorporated logo(s) into template files and made appropriate modifications to template files for the broadcast.
d. Create a project for the broadcast

B. Keys to Easier ITB Broadcasts

Before starting a new ITB broadcast, the easiest approach is to:

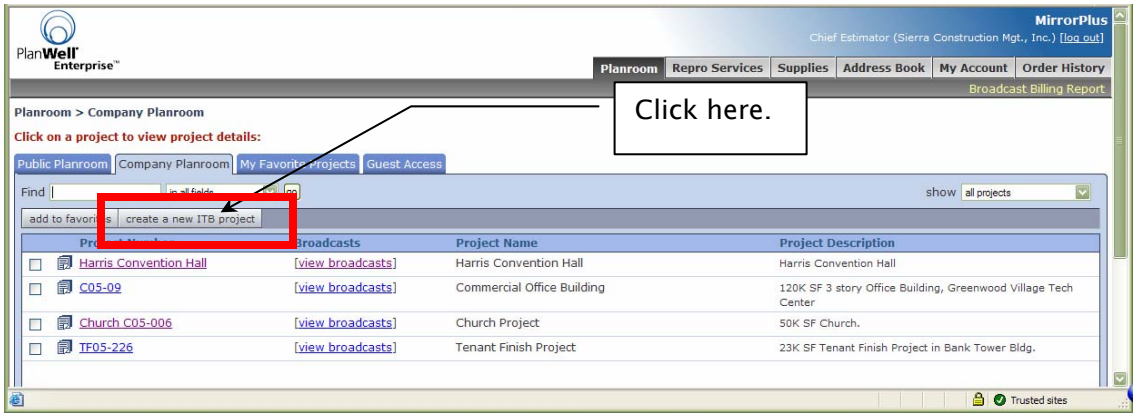
a. Pre-model Bid Lists and save as a Group name.
b. Pre-model ITB Templates to be used.
c. Create the project inside BidCaster.
d. Load plans and specifications into PlanWell (optional).

Once completed, this expedites the broadcast by making it significantly faster and easier.

C. Create a New ITB Project

To Setup a new project,

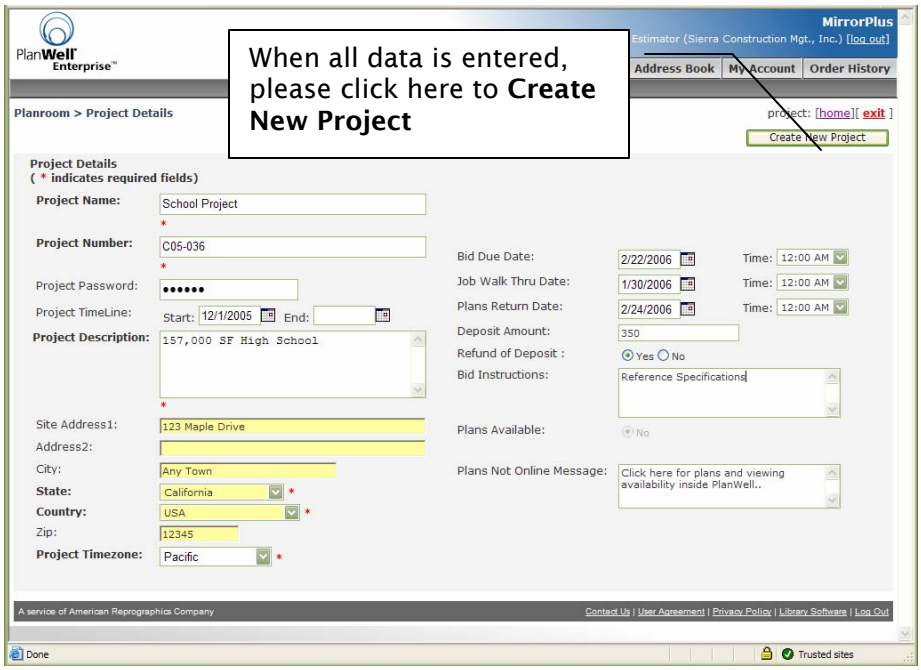
→ Click on **create a new ITB project**



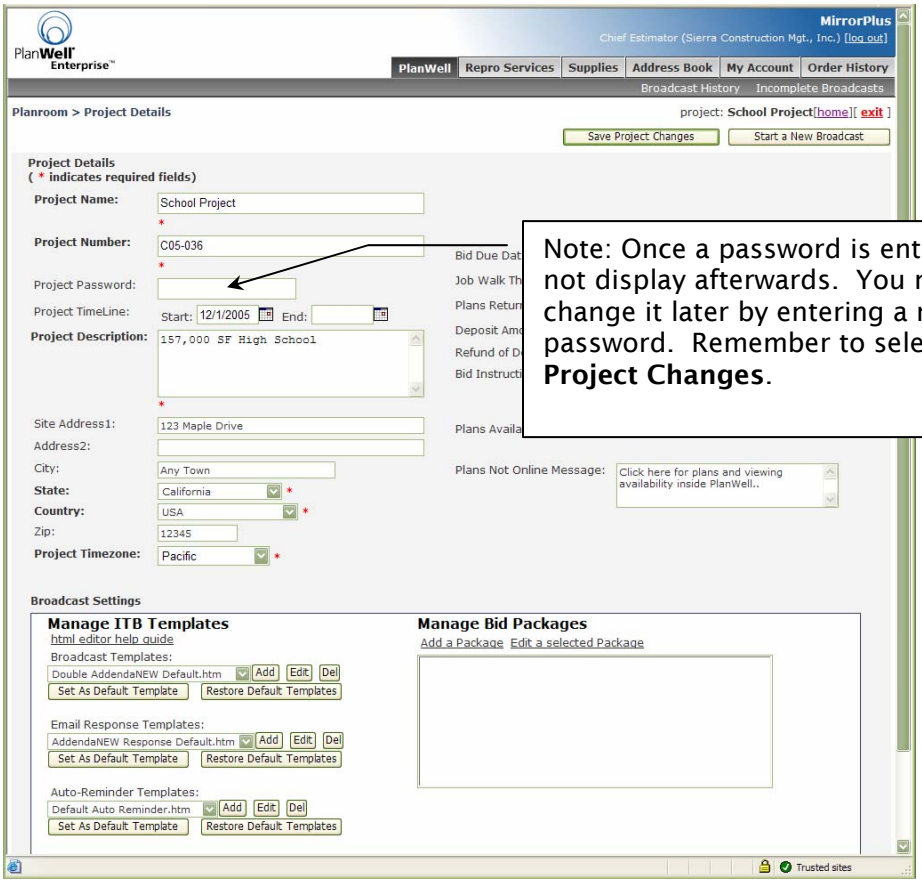
Proceed to fill out project information paying attention to required (asterisked) information, ref. next screen.

Once completed,

→ Click Create New Project



The screen will refresh to display **Project Details** along with **Broadcast Settings** information, ref. next screen.



D. Broadcast Settings Area

Under this category are two areas:

a. Manage ITB Templates and
b. Manage Bid Packages.

1. Manage ITB Templates

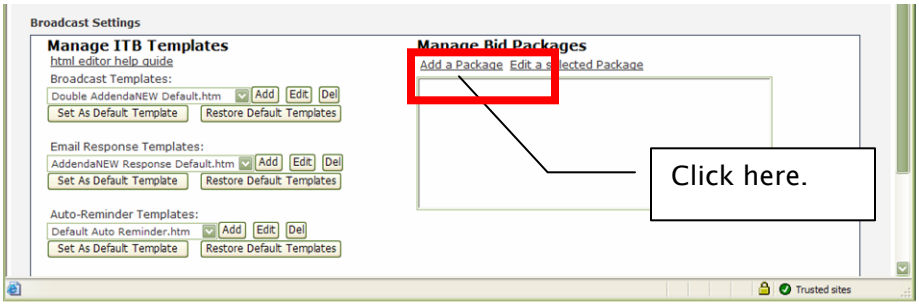
Use **Manage ITB Templates** to create and save required templates, plus use **Set As Default Template** buttons to display project templates at the top of pull down menus for Broadcast, Response and Auto-Reminder Templates. The next time you access **Project Details**, these templates will display at the top of the pull down menus until such time as changed.

2. Manage Bid Packages

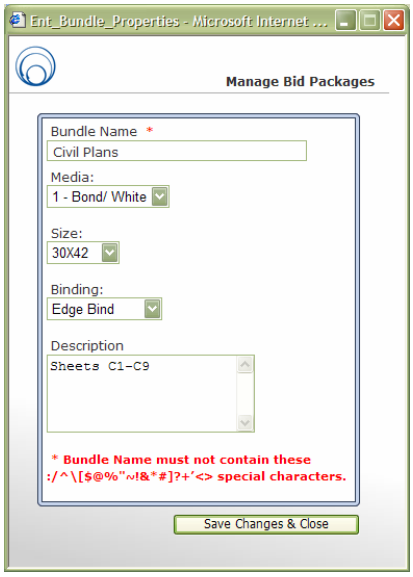
An alternative is to use the **Manage Bid Packages** option to define virtual packages, for example when plans are not yet ready for posting to PlanWell by the design team. This feature is typically used in conjunction with our unique and powerful new **Assign Print Order** feature which we will address in **Chapter 5, Broadcast Steps** in detail. The purpose is to allow a general contractor to issue an ITB ahead of when plans will be ready, yet still tell specific Bidders in the ITB which plans will be provided to them free of charge, but only when they first respond with a YES bid acknowledgment. The term "virtual packages" denotes that plans and specs don't yet exist inside PlanWell. Virtual packages are created solely for communication purposes within the ITB message sent to Bidders and until such time as plans and specs are posted (or not) to PlanWell.

Assuming plans have not yet been posted to PlanWell, proceed as follows to set up virtual bid packages:

→ Click **Add a Package**



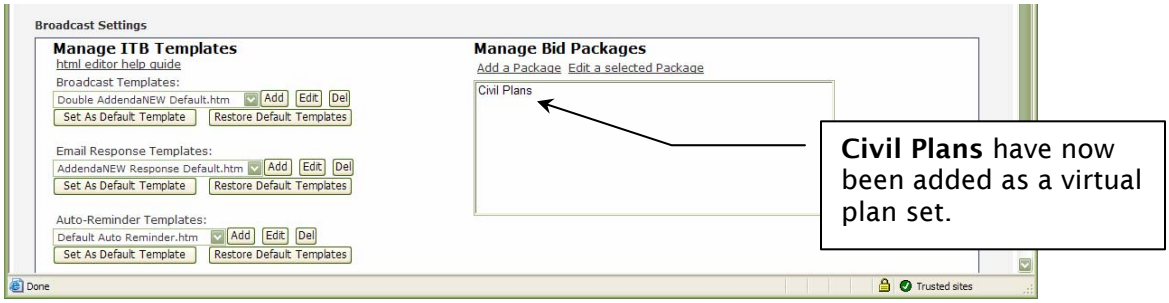
Proceed to fill out all fields shown below.



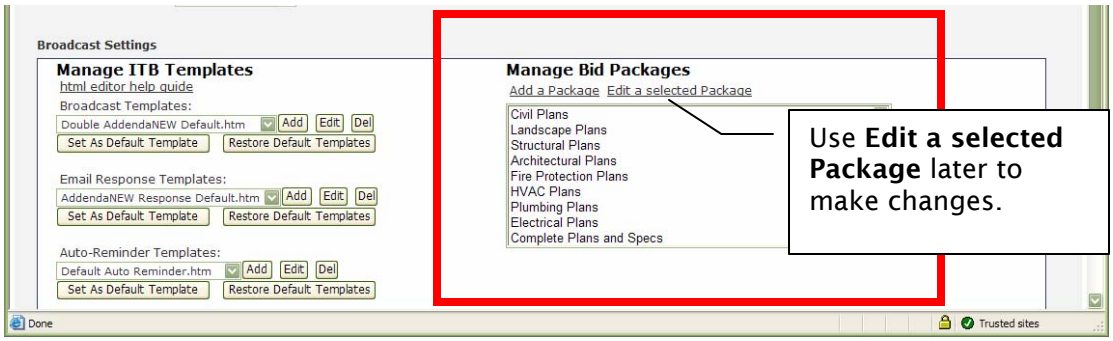
Once finished,

→ Click **Save Changes & Close**

The screen will refresh to display that **Civil Plans** have been added to **Manage Bid Packages**, ref. next screen.



Use this process repeatedly to define and add all desired virtual Bid Packages. Once complete, it should appear as follows:

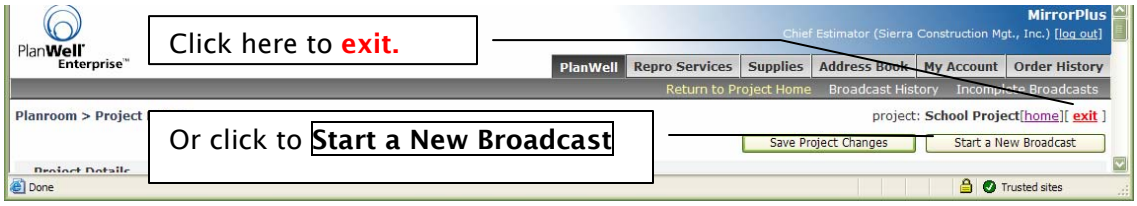


Use **Edit a selected Package** to make necessary changes later as required.

Note: Once actual plans and specs are posted to PlanWell, they will replace all virtual bid packages. You may not add any further virtual packages at that time.

Once Manage Bid Packages are completed, you may save changes and exit as follows:

→ Click **Save Project Changes**
→ Click **exit**, ref. screen below.



If exiting, you will then be placed back in the **Company Planroom** screen, ref. screen on next page.

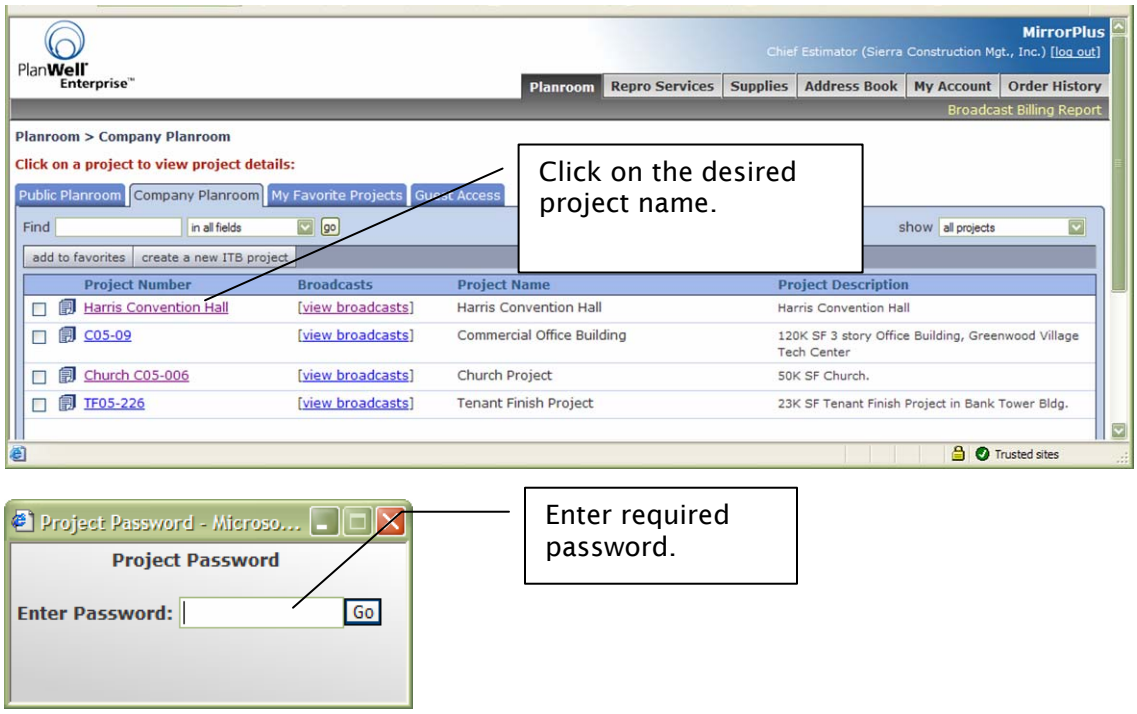
Or, you may elect to **Start a New Broadcast.**

E. Starting a New Broadcast

1. Select a Project.

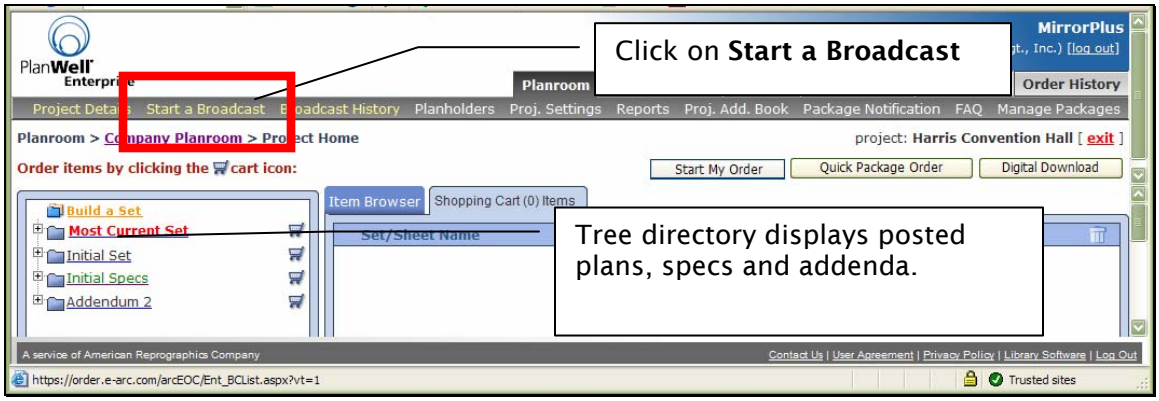
Once **Project Details** have been entered and verified, you may proceed with the broadcast process.

→ Select your chosen project inside the **Company Planroom** screen,
→ Click and enter the required password, ref screen below.

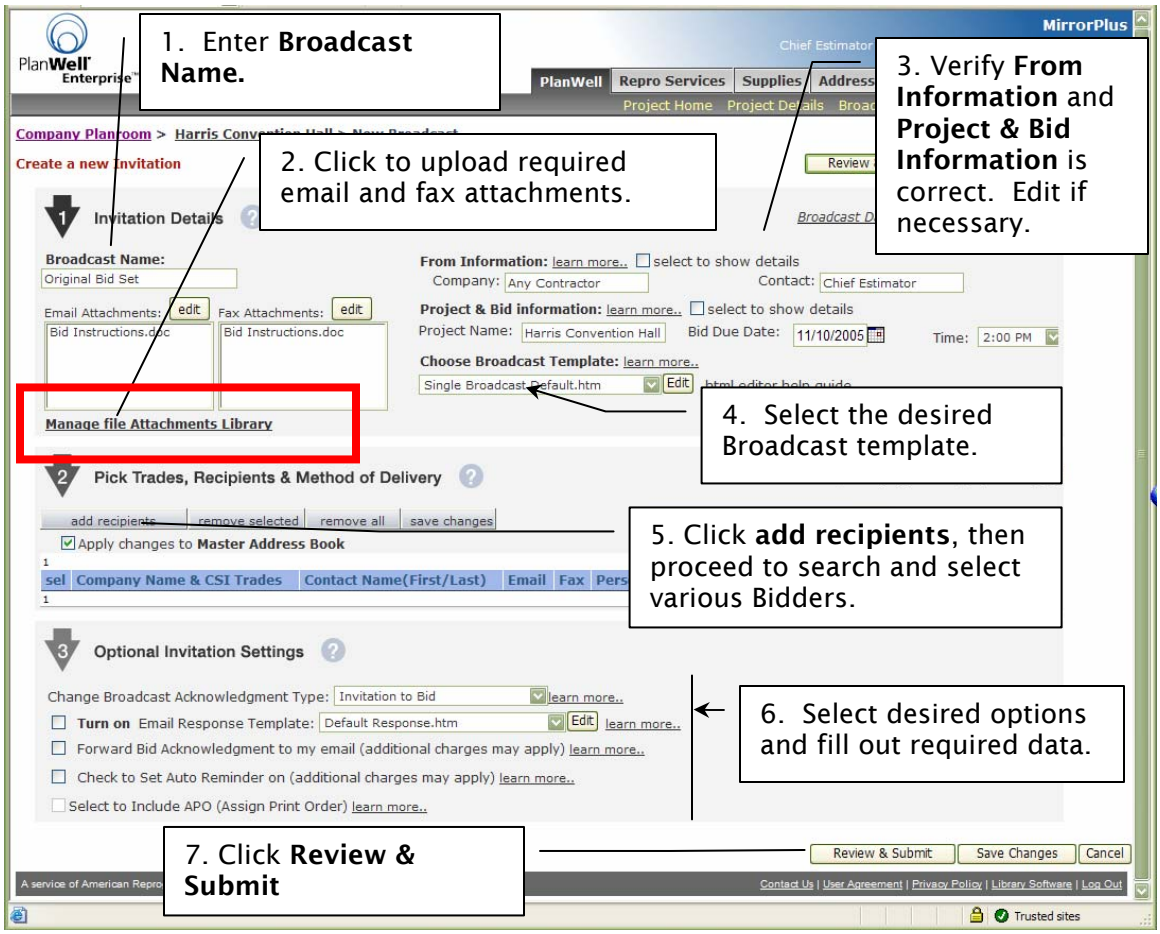


You will automatically access the planroom for the specific project, ref. next screen. Note that project plans, specs and applicable addenda in this example have already been posted inside PlanWell and display as required within the tree directory (left side of screen).

→ Click **Start a New Broadcast**



The **New Broadcast** screen now appears. It is now a matter of following Steps 1 through 3. A quick overview of the process is outlined as shown below.

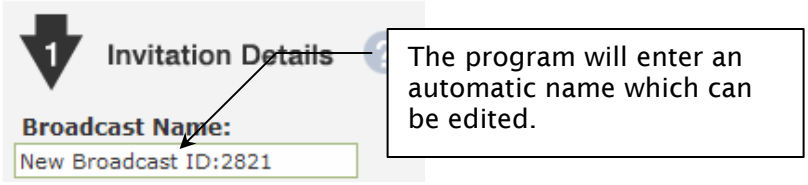

1. Enter **Broadcast Name.**
2. Click to upload required email and fax attachments.
3. Verify **From Information** and **Project & Bid Information** is correct. Edit if necessary.
4. Select the desired Broadcast template.
5. Click **add recipients**, then proceed to search and select various Bidders.
6. Select desired options and fill out required data.
7. Click **Review & Submit**
Invitation Details
Broadcast Name:
Original Bid Set
Manage file Attachments Library
Pick Trades, Recipients & Method of Delivery
Optional Invitation Settings
Review & Submit
Save Changes
Cancel

2. Step 1 - Invitation Details

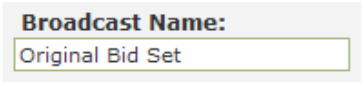
The following outlines specific tasks associated with this step.

a. Enter BroadCast Name

The program will automatically enter a name for the broadcast, ref. next screen.



It may be edited, so for demonstration purposes, we have entered

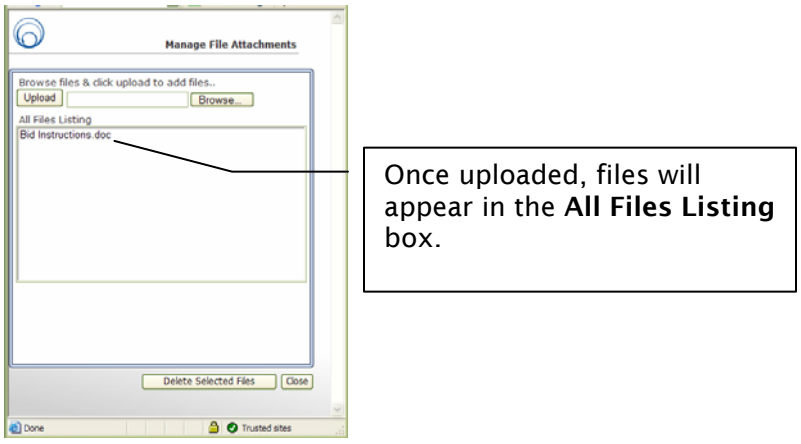


Note, if this was a broadcast required for an addendum, you might have entered "Addendum 01".

b. Manage File Attachments Library

Clicking on the **Manage File Attachments Library** this link opens the associated dialog box below. Email File attachments are limited to a maximum size of 1 MB which is the size that virtually all ISPs (Internet Service Providers) across the country can support. Note: BidCaster will now automatically convert digital files to a faxable tif image.

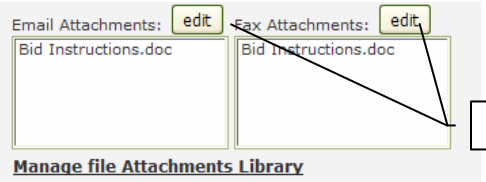
- → Proceed to **Browse** and upload any files to be attached or faxed with the ITB broadcast.
- → Once uploaded, click on the **Close** button.



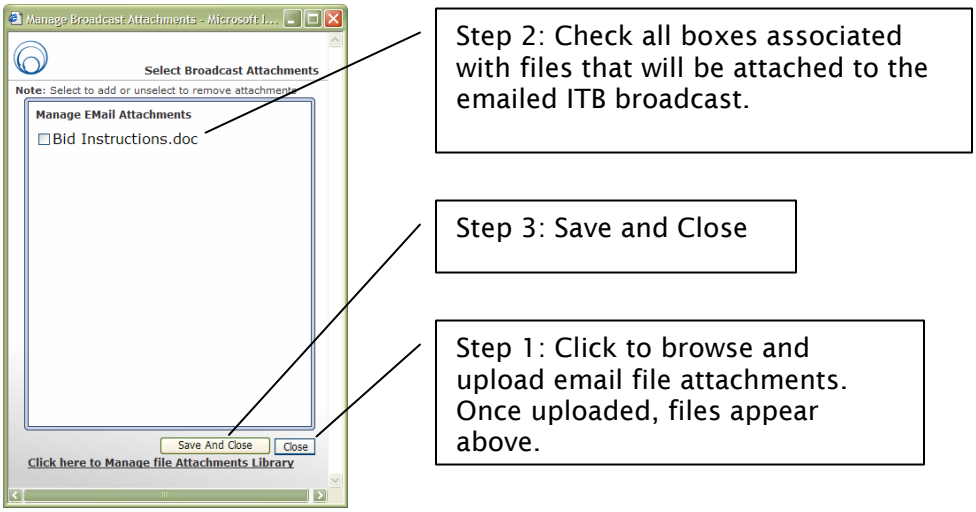
c. Edit Email & Fax Attachments

Next to **Email Attachments or Fax Attachments**

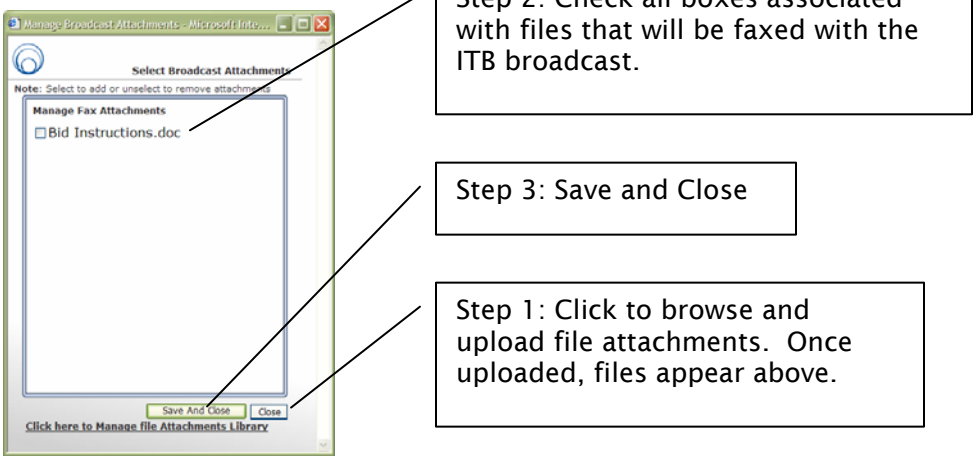
→ Click on **edit**.



The **Select Broadcast Attachments** screen now appears.

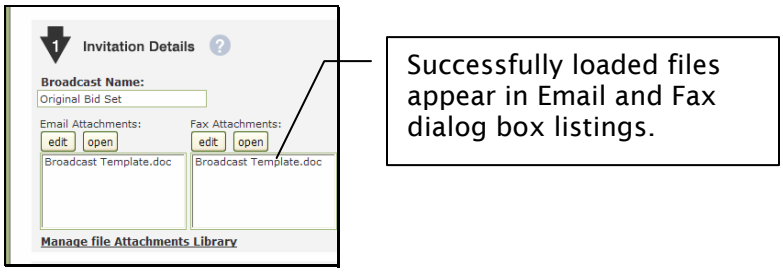

Manage Broadcast Attachments - Microsoft I...
Select Broadcast Attachments
Note: Select to add or unselect to remove attachments
Manage EMail Attachments
Bid Instructions.doc
Save And Close
Close
Click here to Manage file Attachments Library
Step 2: Check all boxes associated with files that will be attached to the emailed ITB broadcast.
Step 3: Save and Close
Step 1: Click to browse and upload email file attachments. Once uploaded, files appear above.

Faxed files also follow an identical process to select, upload and save for an ITB broadcast, see below.


Select Broadcast Attachments
Note: Select to add or unselect to remove attachments
Manage Fax Attachments
Bid Instructions.doc
Save And Close
Close
Click here to Manage file Attachments Library
Step 2: Check all boxes associated with files that will be faxed with the ITB broadcast.
Step 3: Save and Close
Step 1: Click to browse and upload file attachments. Once uploaded, files appear above.

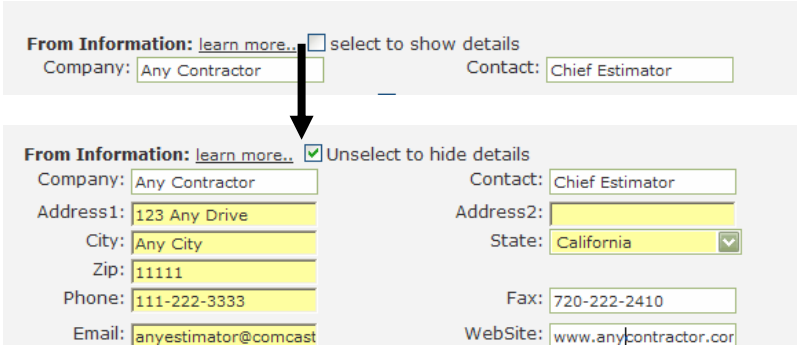
Once complete,

→ Click Save And Close



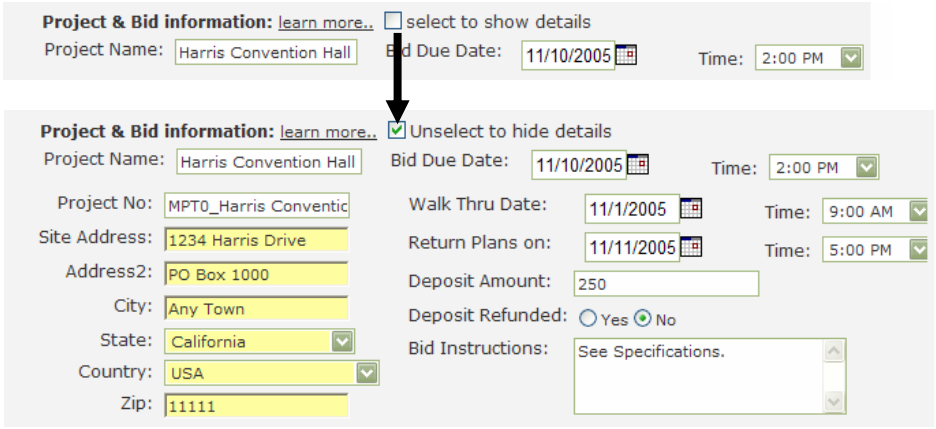
d. From Information

Checking **select to show details** will un-collapse detail information all of which is editable. Typically Users won't edit this information unless they are a project assistant that needs to launch ITB broadcasts using another estimator's name and associated **From Information**.



e. Project & Bid Information

Similarly, you may un-collapse and edit this information as shown below.

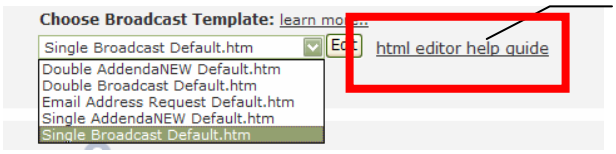

Project & Bid information: learn more.. select to show details
Project Name: Harris Convention Hall
Bid Due Date: 11/10/2005
Time: 2:00 PM
Project & Bid information: learn more.. Unselect to hide details
Project Name: Harris Convention Hall
Bid Due Date: 11/10/2005
Time: 2:00 PM
Project No: MPT0_Harris Conventic
Walk Thru Date: 11/1/2005
Time: 9:00 AM
Site Address: 1234 Harris Drive
Return Plans on: 11/11/2005
Time: 5:00 PM
Address2: PO Box 1000
Deposit Amount: 250
City: Any Town
Deposit Refunded: Yes No
State: California
Bid Instructions: See Specifications.
Country: USA
Zip: 11111

f. Choose Broadcast Template

Templates (or messages) must be employed to reflect all required ITB information. BidCaster employs the use of an HTML (Web Page) Editor program that works in many respects like Microsoft Word. BidCaster templates are 100% customizable.

Default Broadcast templates named below are provided with each new user account. For most ITB broadcasts, the Single (one template) Broadcast Default is the easiest template for GCs and Bidders to understand and use. Any Broadcast default template that has the word "Double" incorporated in the filename requires a Response Template

to work properly. The term "Double" means two templates are needed, a Broadcast and a Response Template. Any Broadcast default template that has the word "Single" incorporated doesn't require a Response template to work properly. Note: There are distinct, but different benefits to use of a "Single" template versus "Double" templates in an ITB broadcast. These benefits are explained previously in this guide under **Chapter 4 - Customizing Templates**.



Tip: When using the HTML editor program, it is advisable to open and print this two page help guide.

For purposes of this guide, we have used the drop down menu to select,

→ **Single Broadcast Default.htm**

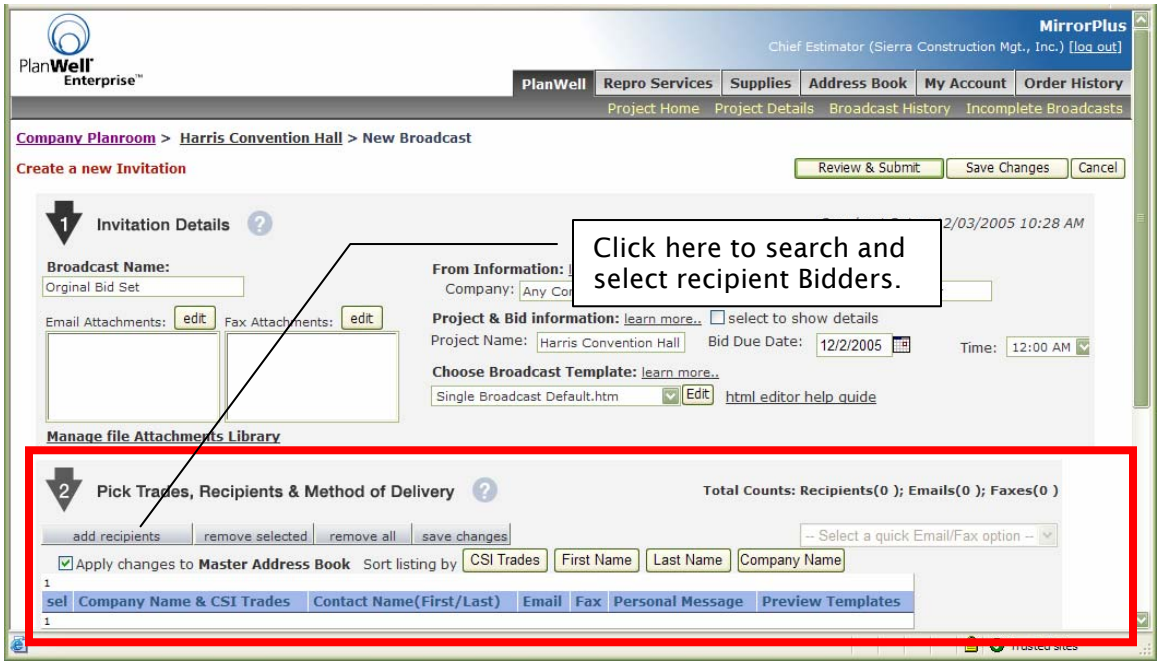
Due to the simplicity of this template, we encourage the use of this specific template for new users, i.e., the **Single Template Approach** described in Chapter 4.

You are now ready to proceed to Step 2.

2. **Step 2, Pick Trades, Recipients & Method of Delivery**

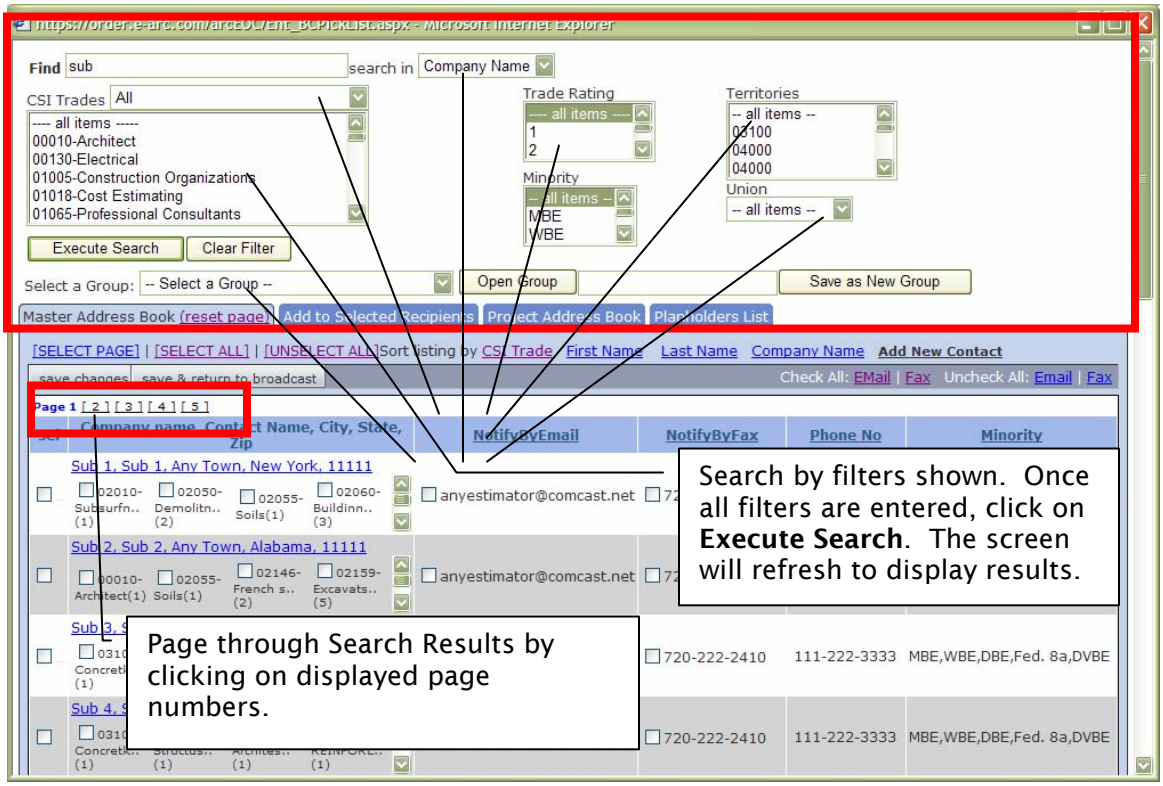
   a. **Add Recipient Bidders**
   This step involves searching and selecting desired recipient Bidders (Subs & Suppliers) for your ITB.

   → Click on **add recipients**



The program automatically defaults to display all Bidders within the Address Book. Searching is accomplished by using various filters indicated. Each filter is explained in detail following this screen.

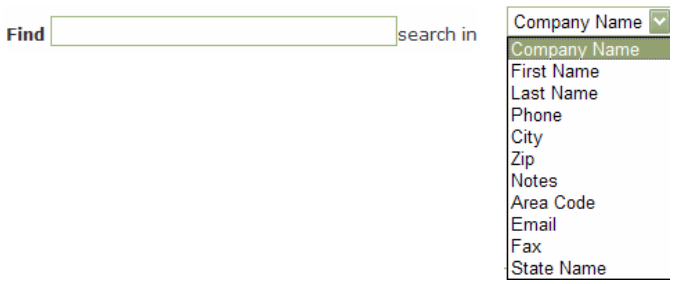
You may proceed to search by **CSI Trades** or use **Find** to filter by **Company Name, First Name, Last Name, Phone, City, Zip, Notes, Area Code** (*new enhancement*)**, State Name, Trade Rating (scale 1 to 5), Minority, Territories (City & State), Union status (Union, Open Shop or All) or** by **Group** name**.**



b. Using Find (Company Name, First Name, Last Name, Phone, City, Zip, Notes, Area Code, Email, Fax, State Name)

Note, multiple filters may be selected individually before clicking on **Execute Search.**

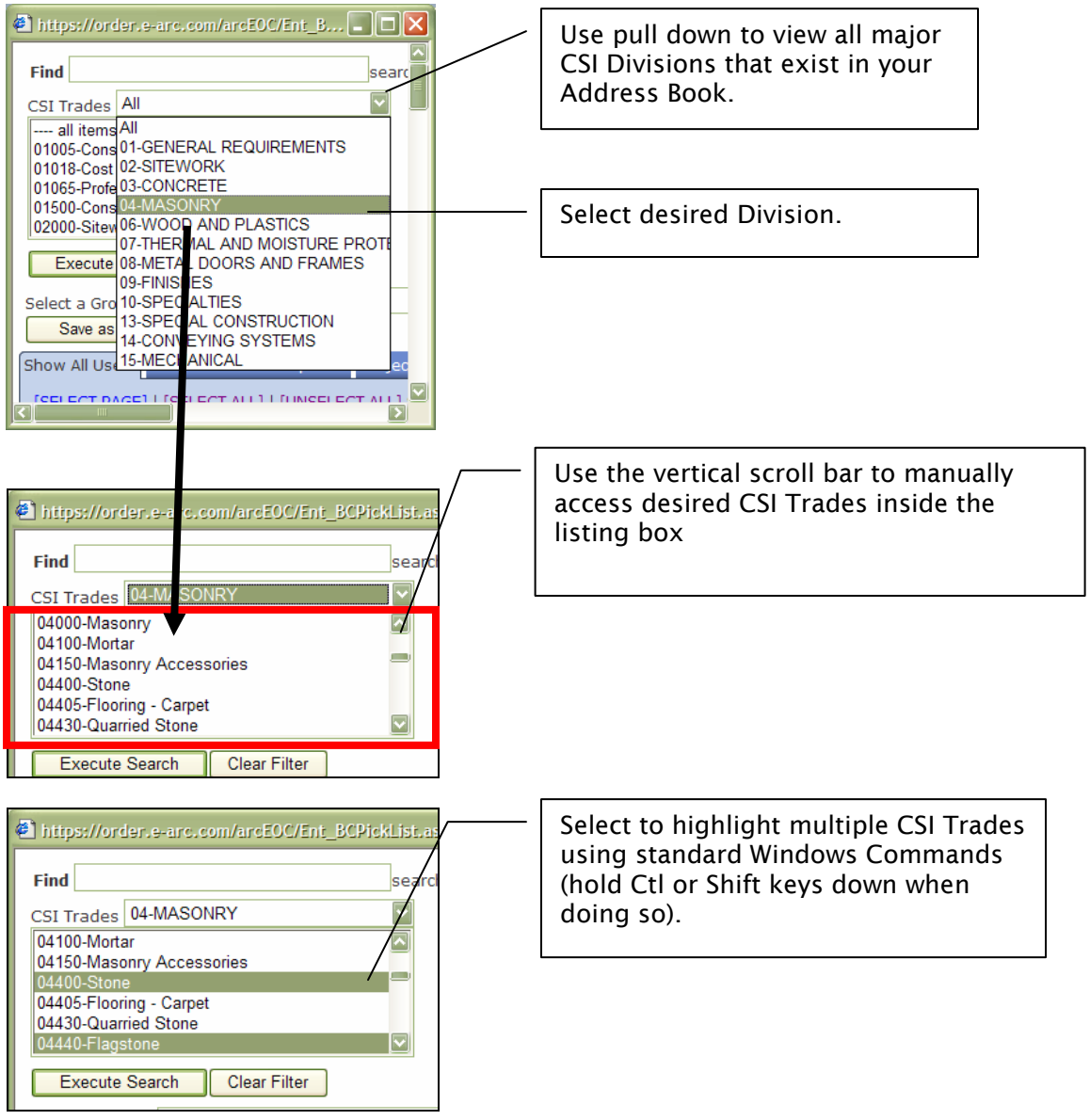
→ Enter **Find** criteria.
→ Use pull down menus to select desired filter. Only one filter is selectable.
→ Once complete, Click on **Execute Search.**



c. Search using CSI Trades

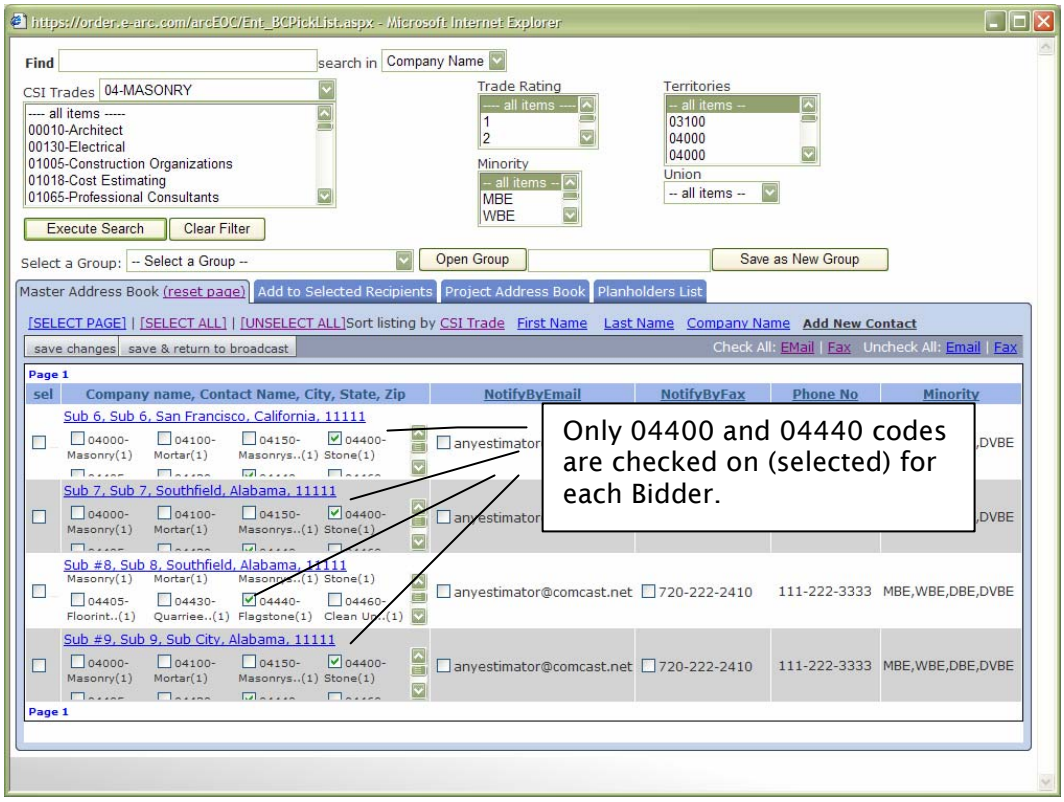
The pull down menu shown below lists all major trade divisions that exist inside your Address Book. Note, in this example there are no CSI division 16 Electrical codes loaded, hence none display in the drop down list. Selecting one of these major divisions will automatically cause the vertical scroll bar to access the beginning of that specific CSI Division.

→ Use the **CSI Trades** pull down menu to select the desired major trade category.



→ Click Execute Search

Results of the search will now display, ref. next screen.

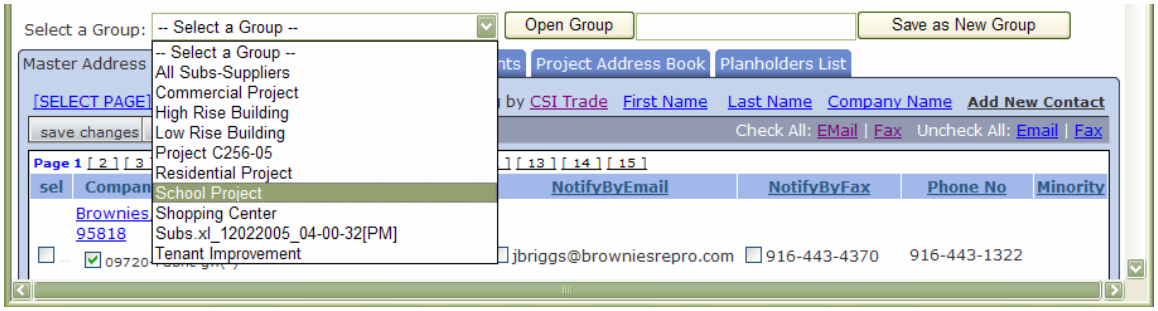


Search results now display CSI Trades for each Bidder that represents such services. Note also that while every CSI codes represented by each Bidder appear, only those associated with the CSI search criteria are checked on. This prevents Bidders from attempting to submit a bid on a trade that is non-existent in plans and specs. Also note that various Ratings (1-5) display next to individual Trades. This helps prevent inadvertent selection of un-qualified Bidders.

d. Select using Groups

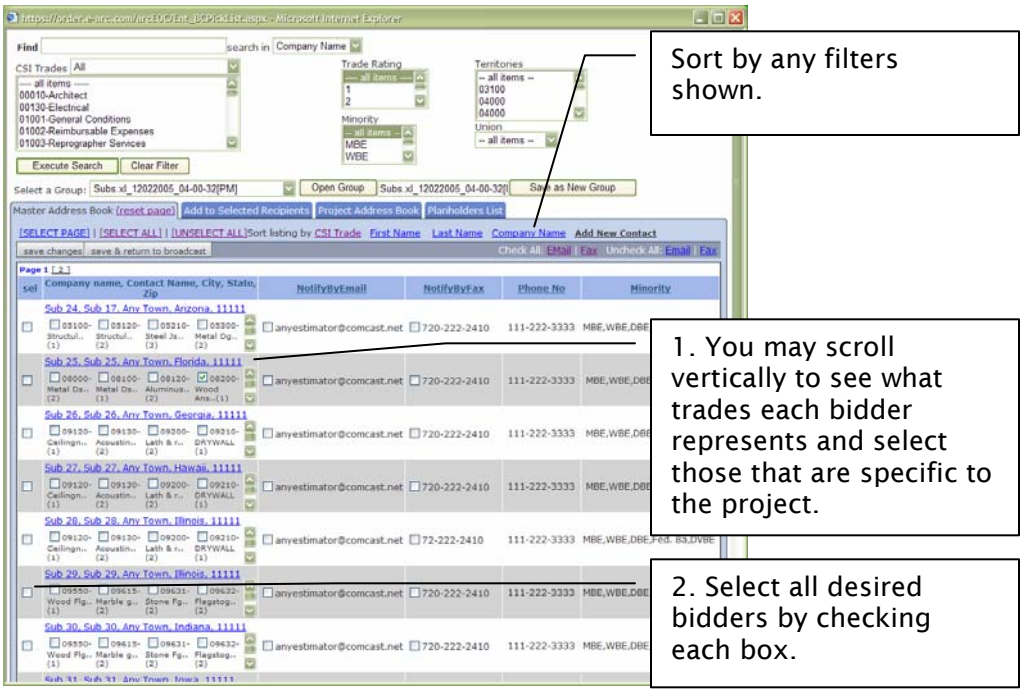
The recommended approach is to pre-model and save various Groups for different types of projects from which your firm often prepares bids. Once accomplished, Step 2 becomes a relatively simple process.

→ Click on **add recipients**
→ Use the pull down menu to select a **Group,** ref. screen below.
→ Click Open Group



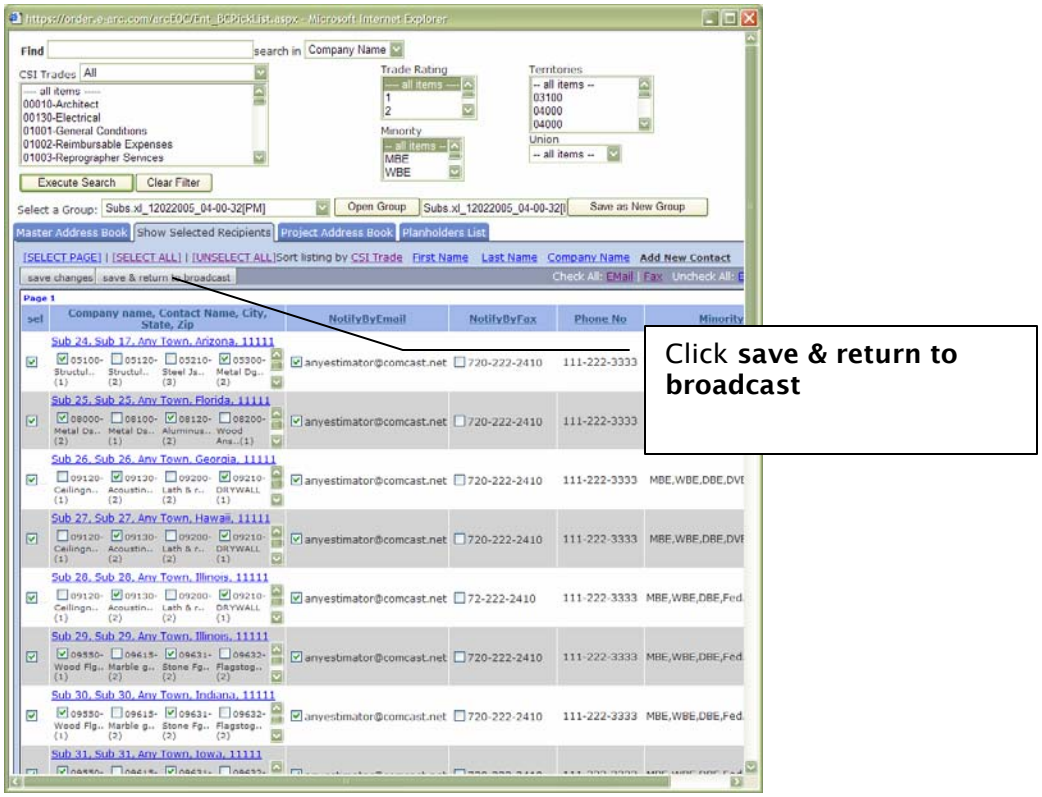
The Group will open and display, ref. following example.

→ proceed to select (check box) bidders as required. Page through screens as required.


Sort by any filters shown.
1. You may scroll vertically to see what trades each bidder represents and select those that are specific to the project.
2. Select all desired bidders by checking each box.

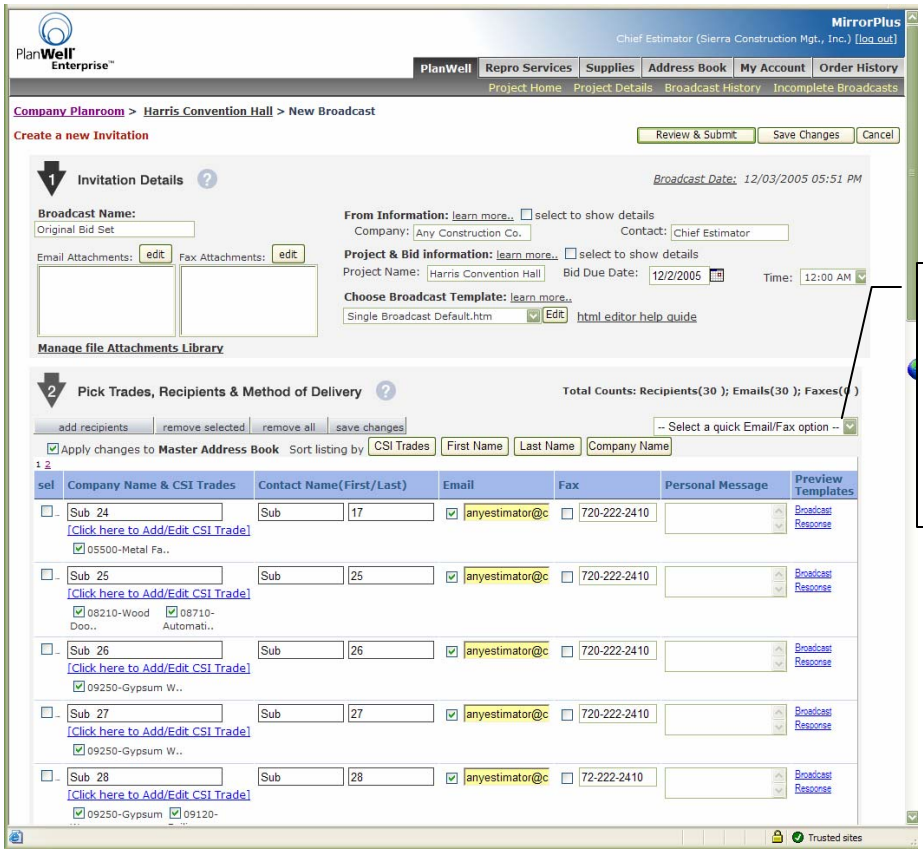
→ Once all are selected, click on **Add to Selected Recipients** tab.

The **Show Selected Recipients** tab now displays all recipients.

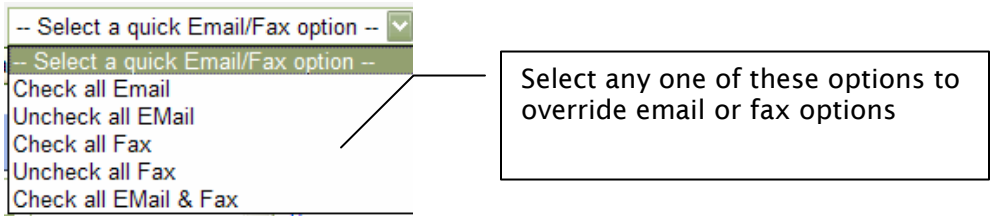


→ Click **save & return to broadcast**

All recipient Bidders now display in Step 2.



Notice that the program automatically check boxes wherever an email address exists and not the fax number. Wherever an email address does not exist, the program defaults to check on to send the ITB by fax number. You may override this setting by using the **Select a quick Email/Fax option,** see example below.

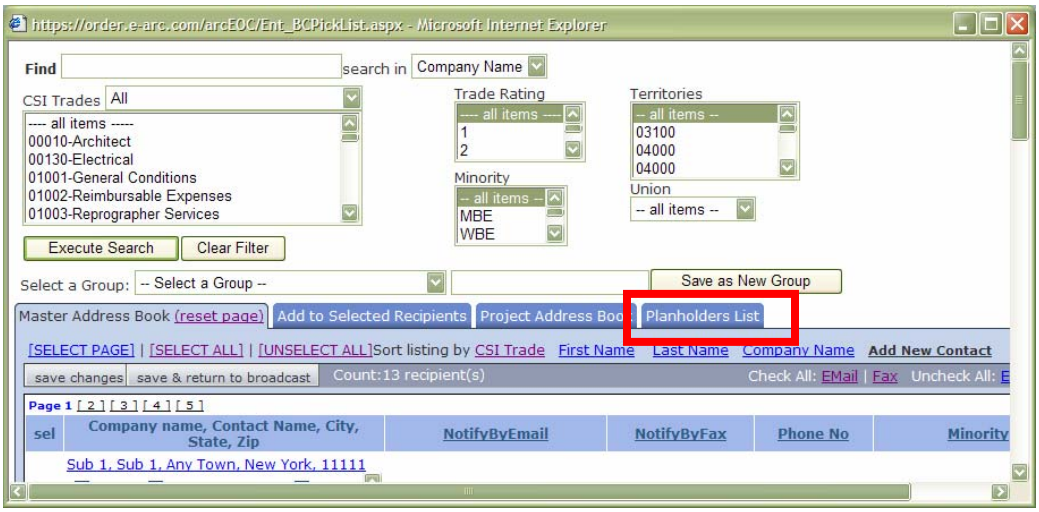

-- Select a quick Email/Fax option --
-- Select a quick Email/Fax option --
Check all Email
Uncheck all EMail
Check all Fax
Uncheck all Fax
Check all EMail & Fax
Select any one of these options to override email or fax options

Once Bidders are selected, you may proceed to Step 3.

e. Use Planholders List tab to send a Broadcast

BidCaster now automatically tracks and prepares a Planholders List of Bidders who have purchased or received prints (for instance by a general contractor) on a given project. This list can be used to immediately send out an ITB broadcast. This feature comes in handy especially on public sector bid projects that require all planholders to be notified of an addendum.

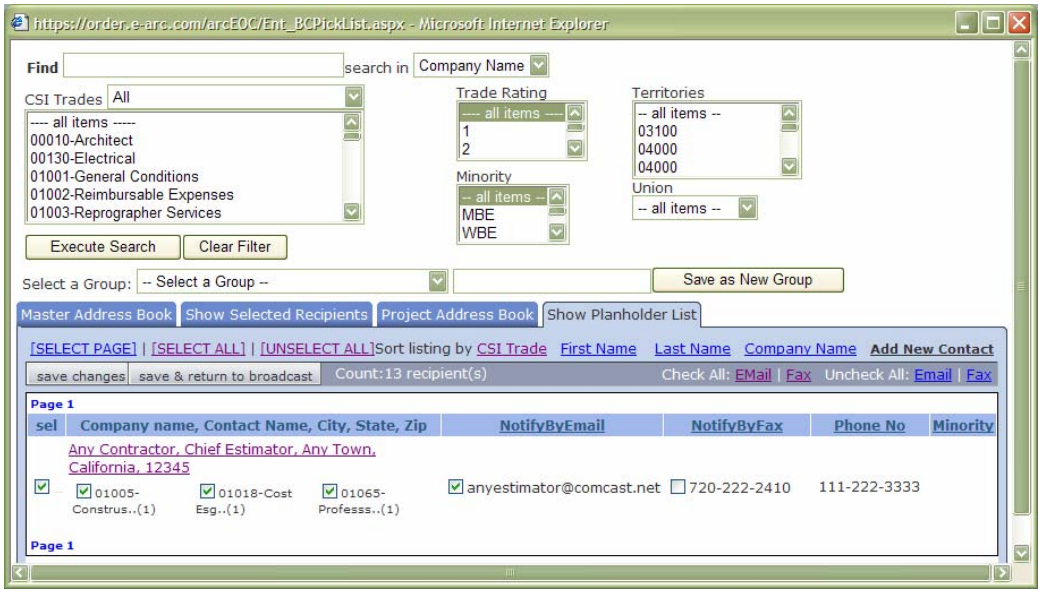
The **Planholders List** tab is only available for use inside **Step 2: add recipients.**



→ Simply click on the Planholders List tab to view Bidders who have received bid documents as print orders submitted through PlanWell.

Once selected, the **Planholders List** tab changes to read **Show Planholders List,** ref. screen below.

Caution: This list reflects print orders submitted to your PlanWell BidCaster Provider through PlanWell only. It does not necessarily represent a planhoders list maintained by a public agency. It does include print orders defined using the Broadcast APO feature.



Once bidders have been selected, you may proceed to Step 3,

3. **Step 3 - Optional Invitation Settings**
   This step lists a number of optional settings associated with some powerful and unique benefits.

a. Change Broadcast Acknowledgment Type

BidCaster offers two types of acknowledgement messages that general contractors can send to Bidders when they send a broadcast.

- An **Invitation to Bid Acknowledgment** message
- An **Information Acknowledgment** message

Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid learn more..
Turn on Email Response Template: Invitation to Bid Information Acknowledgement Edit learn more..
Check to Set Auto Reminder on (additional charges may apply) learn more..
Reminder Date: Time: 12:00 AM Auto-Reminder Template: Default Auto Reminder.htm Edit
Select to Include APO (Assign Print Order) learn more..

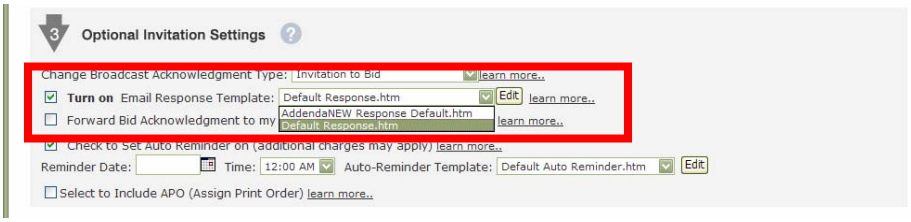
As described in Chapter 4, these messages are opened using the BA link that is embedded in templates.

Use the Invitation to **Bid Acknowledgment** message for standard ITB tasks during the bid phase. Use an **Information Acknowledgement** message during construction or design phases to send and track for example, change orders, meeting minutes, any type of communication. This recognizes that BidCaster is simply a communication engine that can send and track any type of information.

b. Turn on Email Response Template

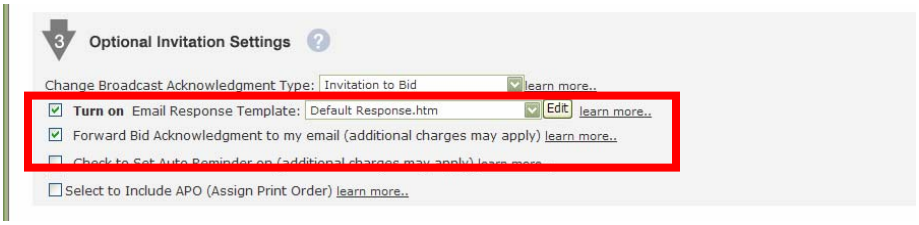
If you decide to use a **Double Template Approach**, you'll need to turn this on since a Response template is now necessary.

→ Select (Check box) **Turn on Email Response Template**
→ Select desired template.
→ Click Edit if the template requires modification.


Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid learn more..
Turn on Email Response Template: Default Response.htm Edit learn more..
Forward Bid Acknowledgment to my AddendaNEW Response Default.htm Default Response.htm learn more..
Check to Set Auto Reminder on (additional charges may apply) learn more..
Reminder Date: Time: 12:00 AM Auto-Reminder Template: Default Auto Reminder.htm Edit
Select to Include APO (Assign Print Order) learn more..

c. Forward Bid Acknowledgement to my email

Select this option if you desire a copy of each bid acknowledgement emailed immediately to your inbox immediately after submittal by a Bidder. In this day and age where it's important to know immediately when a critical Bidder drops out of a bid, the value of this service becomes apparent.


Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid learn more..
Turn on Email Response Template: Default Response.htm Edit learn more..
Forward Bid Acknowledgment to my email (additional charges may apply) learn more..
Select to Include APO (Assign Print Order) learn more..

Here's an example of an emailed **Broadcast Bid Acknowledgment Notification**.

Inbox
Arranged By: Date
Newest on top
support@planwell.com Tue 9:14 AM
Broadcast Ack. mail for: Addenda 02 Any Con...
anyestimator@comcast.net Tue 8:25 AM
re: Harris Convention Hall, Addenda 02
anyestimator@comcast.net Tue 8:25 AM
re: Harris Convention Hall, Addenda 02
anyestimator@comcast.net Tue 8:15 AM
re: Harris Convention Hall, Addenda 03
anyestimator@comcast.net Tue 8:15 AM
re: Harris Convention Hall, Addenda 03
anyestimator@comcast.net 11/18/2005
re: Harris Convention Hall, Addenda #01
anyestimator@comcast.net 11/17/2005
re: Harris Convention Hall, No BA Link Broadcast
anyestimator@comcast.net 11/15/2005
re: Harris Convention Hall, Original Bid Set
anyestimator@comcast.net 11/15/2005
re: Harris Convention Hall, Original Bid Set
anyestimator@comcast.net 11/15/2005
re: Harris Convention Hall, Original Bid Set
4302 Items
Broadcast Ack. mail for: Addenda 02 Any Contractor
support@planwell.com
To: anyestimator@comcast.net
Broadcast Bid Acknowledgment Notification
BroadCast Name: Addenda 02
Company Name: Any Contractor
Contact Person: Chief Estimator
Response Status: Yes
User Comments: Thanks for inviting us to bid on this project.
Beth
I will submit a bid based on the following CSI Codes:
01005: Construction Organizations - Yes
01018: Cost Estimating - Yes
01065: Professional Consultants - Yes

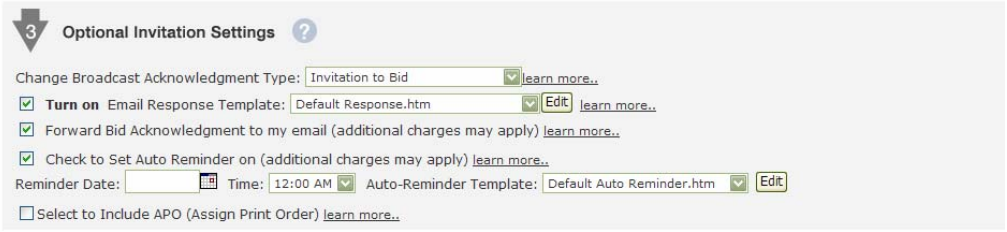
d. Set Auto Reminder Option

This option will email an automatic reminder notice to Bidders who haven't responded to an ITB by a due date and time. The process is straightforward,

→ Turn on the check box to activate the option.

The screen will refresh to display all date, time and template tasks, ref. screen below.

→ Enter the reminder date by clicking on the calendar icon
→ Enter the time of day by using the pull down menu shown.
→ Select the desired template using the pull down menu shown.
→ Click Edit if templates require modification.


3 Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid learn more..
Turn on Email Response Template: Default Response.htm Edit learn more..
Forward Bid Acknowledgment to my email (additional charges may apply) learn more..
Check to Set Auto Reminder on (additional charges may apply) learn more..
Reminder Date: Time: 12:00 AM Auto-Reminder Template: Default Auto Reminder.htm Edit
Select to Include APO (Assign Print Order) learn more..

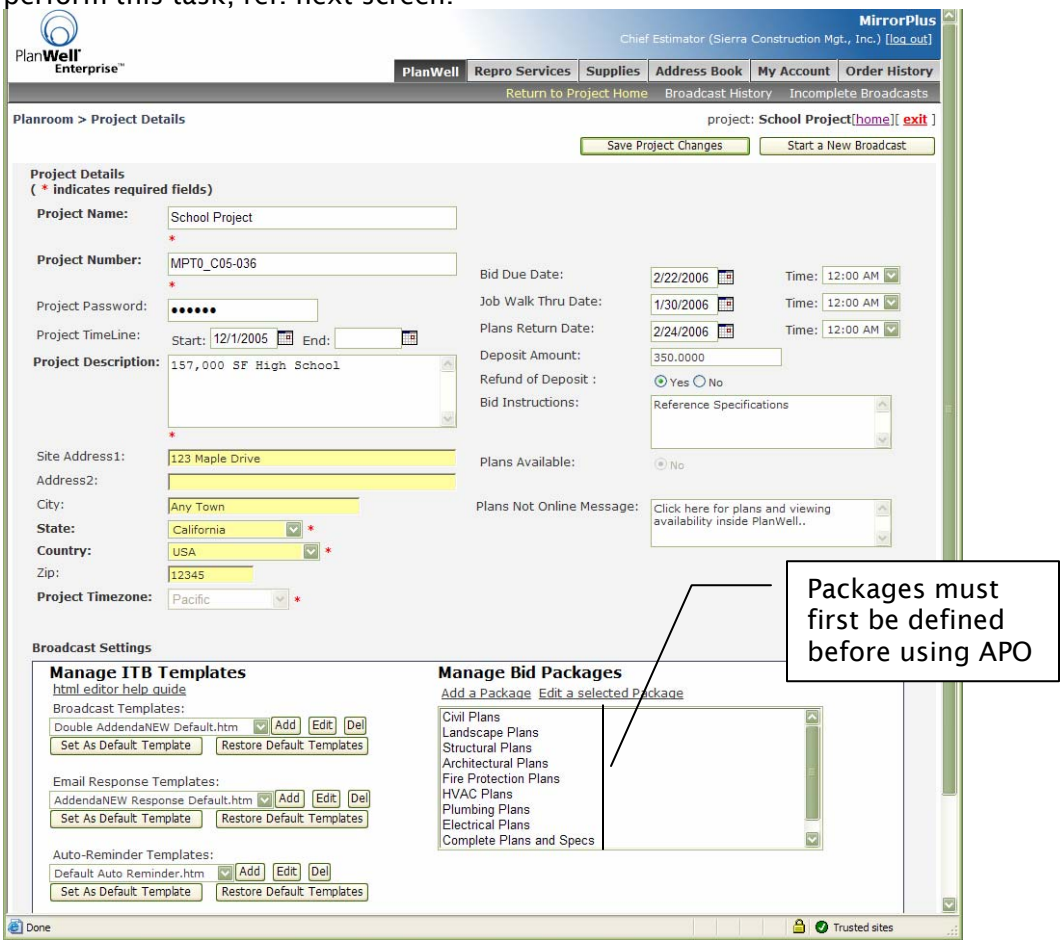
e. APO (Assign Print Order) Option

General contractors may now define individual prints orders (including delivery) for various Bidders which are automatically placed once Bidders submit an online YES bid acknowledgment through BidCaster. The benefits of this service are significant:

a. Print-on-demand represents significant savings for Users.
b. APO saves significant time and effort through automatic print order and delivery.

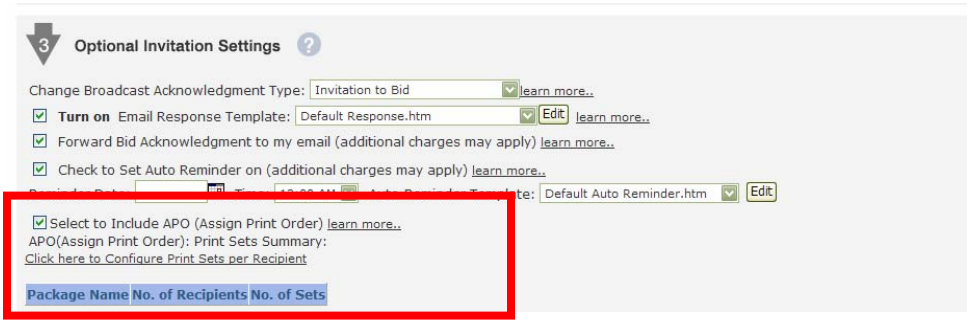
BidCaster is the only ITB product on the market that combines the ITB process with a print & delivery order for individual Bidders. This unique and powerful feature is one which we believe will rapidly become an industry standard. Content Providers will be responsible for payment of all orders when using the APO process.

A pre-requisite to using APO is that either virtual packages must be defined or plans and specs must be posted to PlanWell. Use Manage Bid Packages inside Project Details to perform this task, ref. next screen.



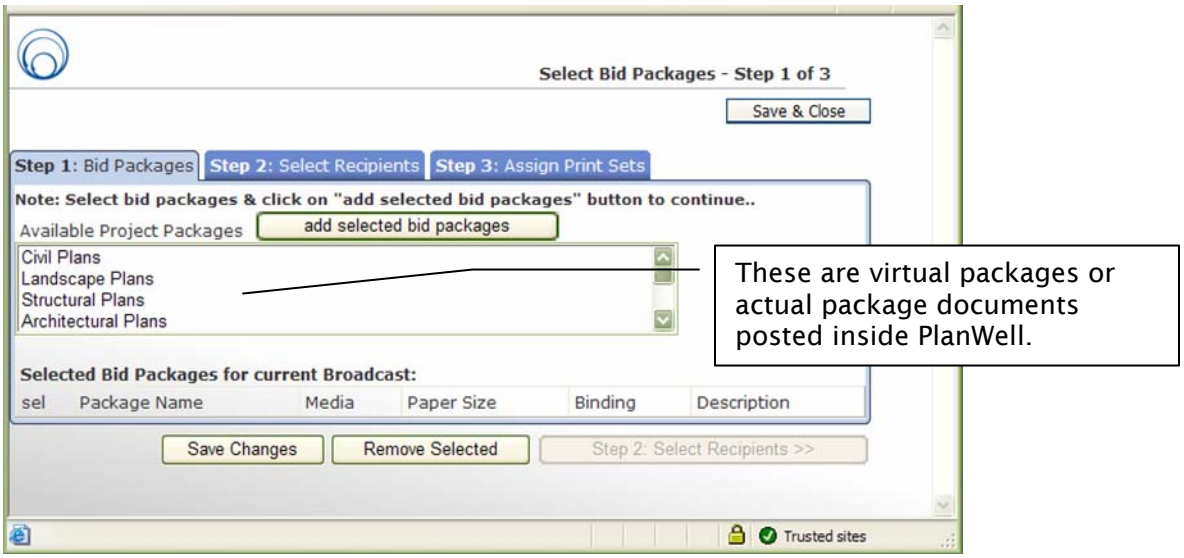
→ Turn on the check box to activate the option where is says **Select to Include APO (Assign Print Order)**

The screen will refresh to display additional functionality.


Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid learn more..
Turn on Email Response Template: Default Response.htm Edit learn more..
Forward Bid Acknowledgment to my email (additional charges may apply) learn more..
Check to Set Auto Reminder on (additional charges may apply) learn more..
Default Auto Reminder.htm Edit
Select to Include APO (Assign Print Order) learn more..
APO(Assign Print Order): Print Sets Summary:
Click here to Configure Print Sets per Recipient
Package Name
No. of Recipients
No. of Sets

→ Select **Click here to Configure Print Sets per Recipient**

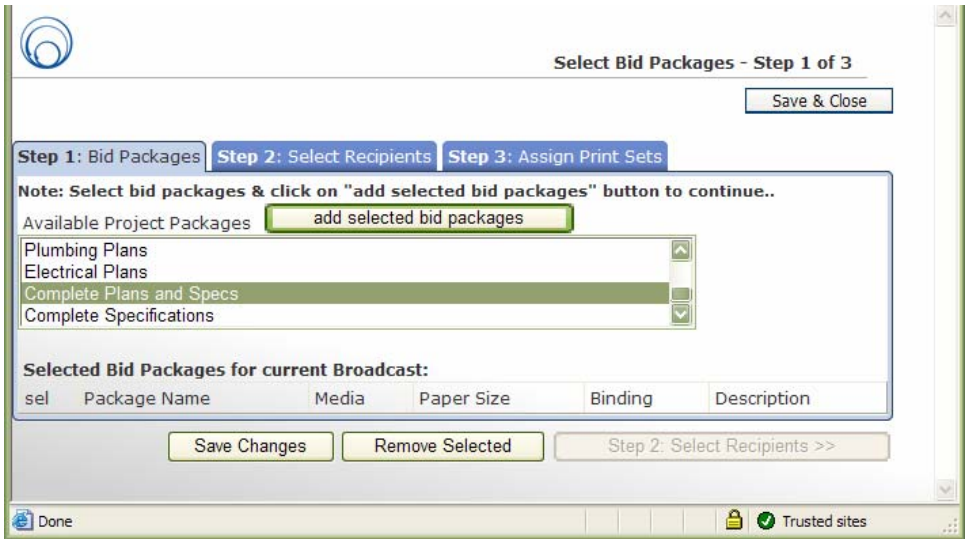
The **Select Bid Packages – Step 1 of 3** screen appears, ref. next screen.



Note, documents posted to PlanWell will replace all virtual packages.

To proceed,

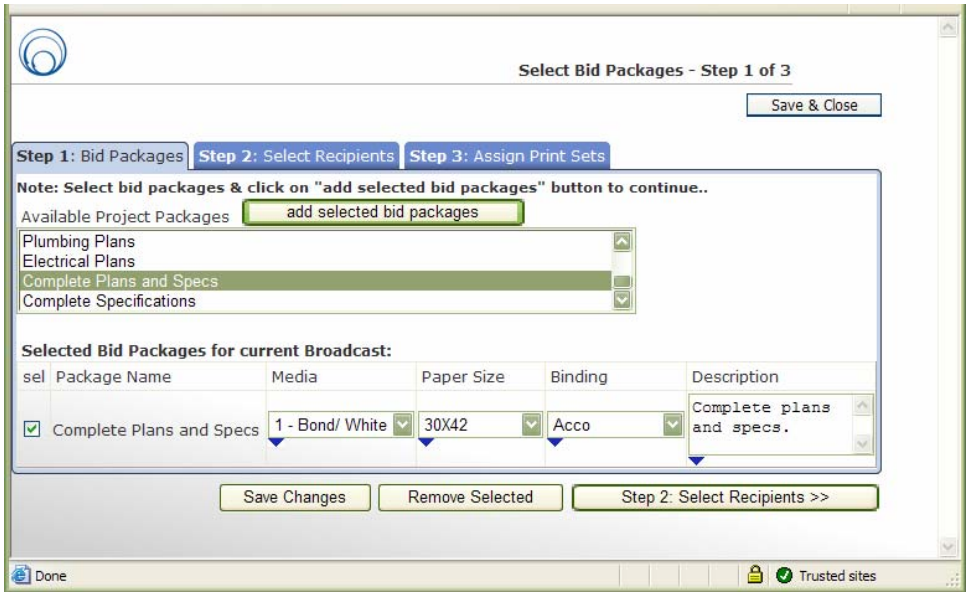
→ Highlight desired packages
→ Click on **add selected bid packages**



Selected Bid Packages for current Broadcast will appear, ref. next screen.

Proceed to,

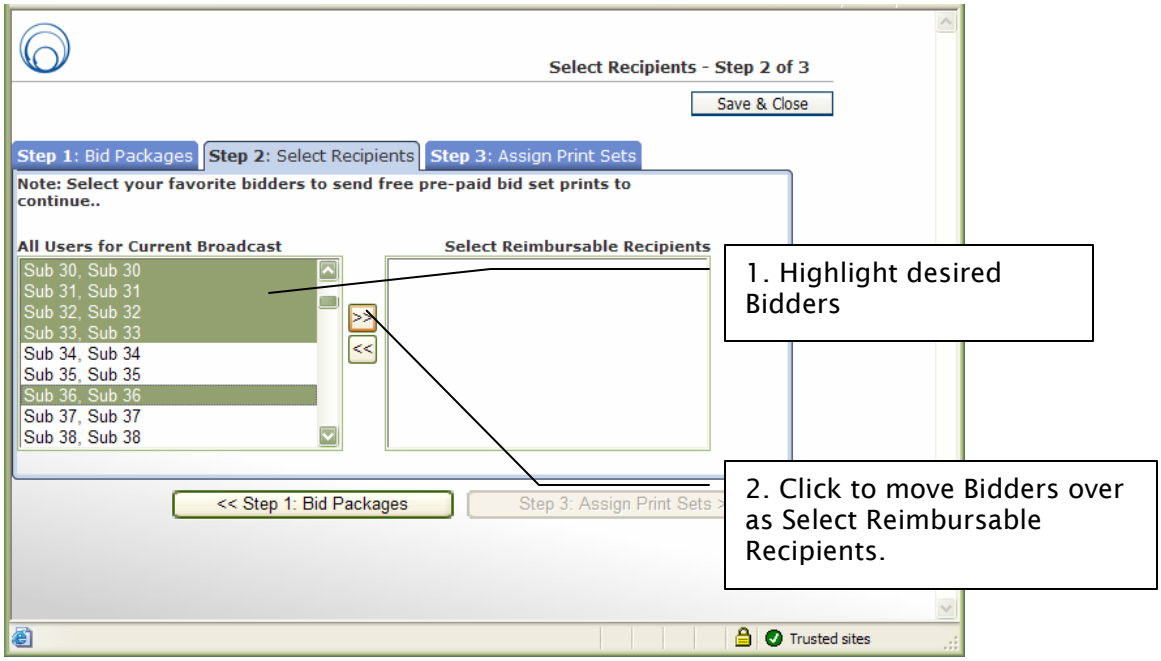
→ Check box desired packages, in this case **Complete Plans and Specs**
→ Fill in a **Description** if desired.
→ Click Step 2: Select Recipients >>



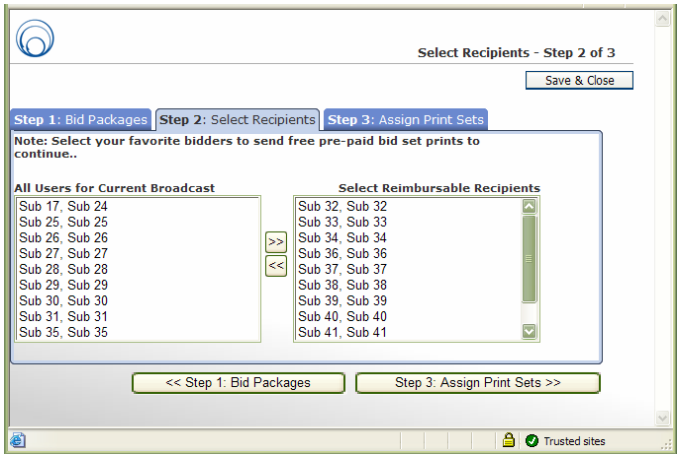
The Select Recipients – Step 2 of 3 screen appears.

Proceed to,

- → Highlight all recipient Bidders that will received Complete Plans and Specs.
- → Click on the right arrow to add Bidders as **Select Reimbursable Recipients**


Select Recipients - Step 2 of 3
Save & Close
Step 1: Bid Packages
Step 2: Select Recipients
Step 3: Assign Print Sets
Note: Select your favorite bidders to send free pre-paid bid set prints to continue..
All Users for Current Broadcast
Select Reimbursable Recipients
Sub 30, Sub 30
Sub 31, Sub 31
Sub 32, Sub 32
Sub 33, Sub 33
Sub 34, Sub 34
Sub 35, Sub 35
Sub 36, Sub 36
Sub 37, Sub 37
Sub 38, Sub 38
>>
<<
<< Step 1: Bid Packages
Step 3: Assign Print Sets >>
Trusted sites
1. Highlight desired Bidders
2. Click to move Bidders over as Select Reimbursable Recipients.

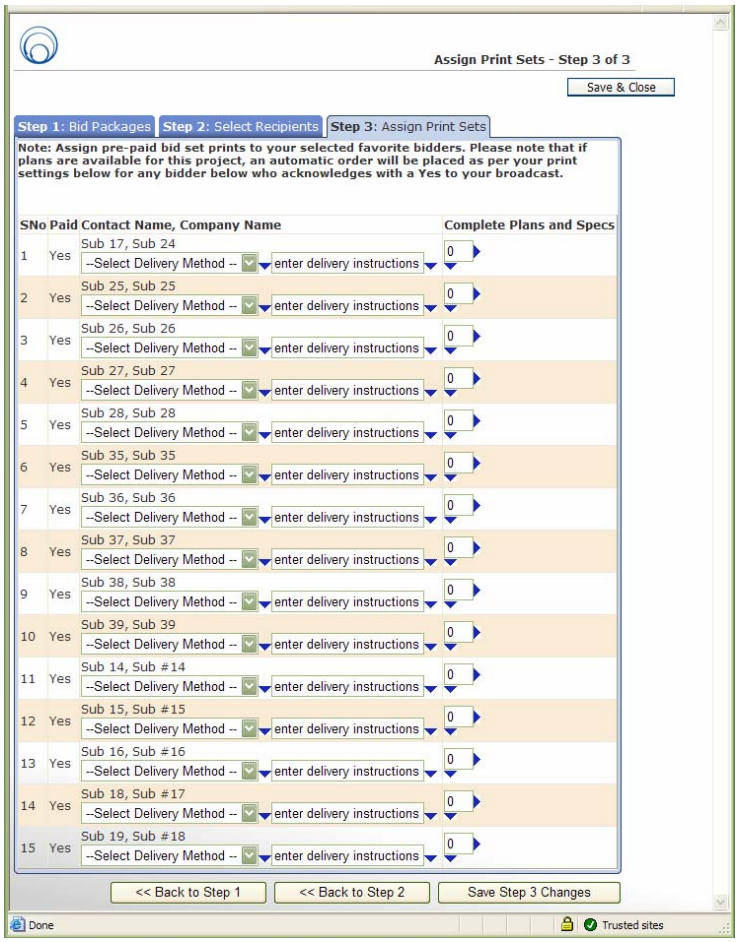
Once all recipient Bidders are selected, the screen should appear similar to the next screen.


Select Recipients - Step 2 of 3
Save & Close
Step 1: Bid Packages
Step 2: Select Recipients
Step 3: Assign Print Sets
Note: Select your favorite bidders to send free pre-paid bid set prints to continue..
All Users for Current Broadcast
Sub 17, Sub 24
Sub 25, Sub 25
Sub 26, Sub 26
Sub 27, Sub 27
Sub 28, Sub 28
Sub 29, Sub 29
Sub 30, Sub 30
Sub 31, Sub 31
Sub 35, Sub 35
>>
<<
Select Reimbursable Recipients
Sub 32, Sub 32
Sub 33, Sub 33
Sub 34, Sub 34
Sub 36, Sub 36
Sub 37, Sub 37
Sub 38, Sub 38
Sub 39, Sub 39
Sub 40, Sub 40
Sub 41, Sub 41
<< Step 1: Bid Packages
Step 3: Assign Print Sets >>
Trusted sites

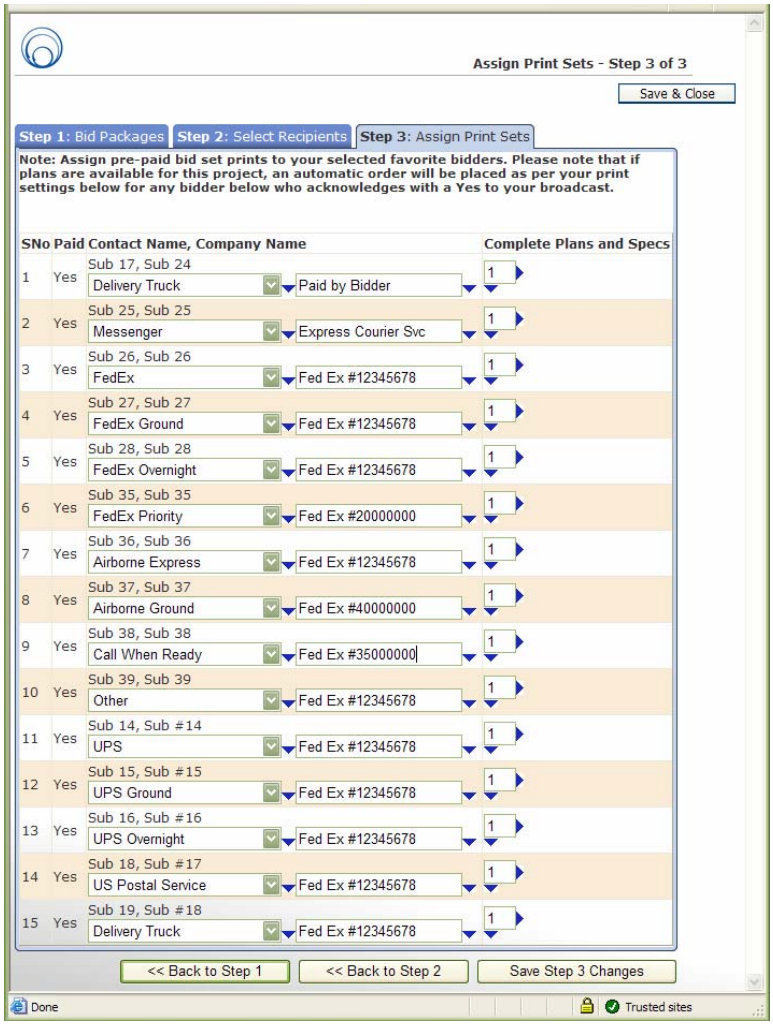
→ Click on **Step 3: Assign Print Sets** tab

Proceed to enter delivery method and instructions as shown below.

→ Use arrows to copy information for fast, easy use.


Assign Print Sets - Step 3 of 3
Save & Close
Step 1: Bid Packages
Step 2: Select Recipients
Step 3: Assign Print Sets
Note: Assign pre-paid bid set prints to your selected favorite bidders. Please note that if plans are available for this project, an automatic order will be placed as per your print settings below for any bidder below who acknowledges with a Yes to your broadcast.
SNo Paid Contact Name, Company Name
Complete Plans and Specs
1 Yes Sub 17, Sub 24
2 Yes Sub 25, Sub 25
3 Yes Sub 26, Sub 26
4 Yes Sub 27, Sub 27
5 Yes Sub 28, Sub 28
6 Yes Sub 35, Sub 35
7 Yes Sub 36, Sub 36
8 Yes Sub 37, Sub 37
9 Yes Sub 38, Sub 38
10 Yes Sub 39, Sub 39
11 Yes Sub 14, Sub #14
12 Yes Sub 15, Sub #15
13 Yes Sub 16, Sub #16
14 Yes Sub 18, Sub #17
15 Yes Sub 19, Sub #18
--Select Delivery Method --
enter delivery instructions
0
<< Back to Step 1
<< Back to Step 2
Save Step 3 Changes
Done
Trusted sites

Once complete, your screen should look like the following example.


Assign Print Sets - Step 3 of 3
Save & Close
Step 1: Bid Packages
Step 2: Select Recipients
Step 3: Assign Print Sets
Note: Assign pre-paid bid set prints to your selected favorite bidders. Please note that if plans are available for this project, an automatic order will be placed as per your print settings below for any bidder below who acknowledges with a Yes to your broadcast.
SNo Paid Contact Name, Company Name
Complete Plans and Specs
1 Yes Sub 17, Sub 24 Delivery Truck Paid by Bidder 1
2 Yes Sub 25, Sub 25 Messenger Express Courier Svc 1
3 Yes Sub 26, Sub 26 FedEx Fed Ex #12345678 1
4 Yes Sub 27, Sub 27 FedEx Ground Fed Ex #12345678 1
5 Yes Sub 28, Sub 28 FedEx Overnight Fed Ex #12345678 1
6 Yes Sub 35, Sub 35 FedEx Priority Fed Ex #20000000 1
7 Yes Sub 36, Sub 36 Airborne Express Fed Ex #12345678 1
8 Yes Sub 37, Sub 37 Airborne Ground Fed Ex #40000000 1
9 Yes Sub 38, Sub 38 Call When Ready Fed Ex #35000000 1
10 Yes Sub 39, Sub 39 Other Fed Ex #12345678 1
11 Yes Sub 14, Sub #14 UPS Fed Ex #12345678 1
12 Yes Sub 15, Sub #15 UPS Ground Fed Ex #12345678 1
13 Yes Sub 16, Sub #16 UPS Overnight Fed Ex #12345678 1
14 Yes Sub 18, Sub #17 US Postal Service Fed Ex #12345678 1
15 Yes Sub 19, Sub #18 Delivery Truck Fed Ex #12345678 1
<< Back to Step 1
<< Back to Step 2
Save Step 3 Changes
Done
Trusted sites

→ Click on **Save Step 3 Changes**

Orders will now be placed when individual Bidders submit a Yes bid acknowledgment.

F. Launch Broadcast

Once Step 3 is completed, proceed to,

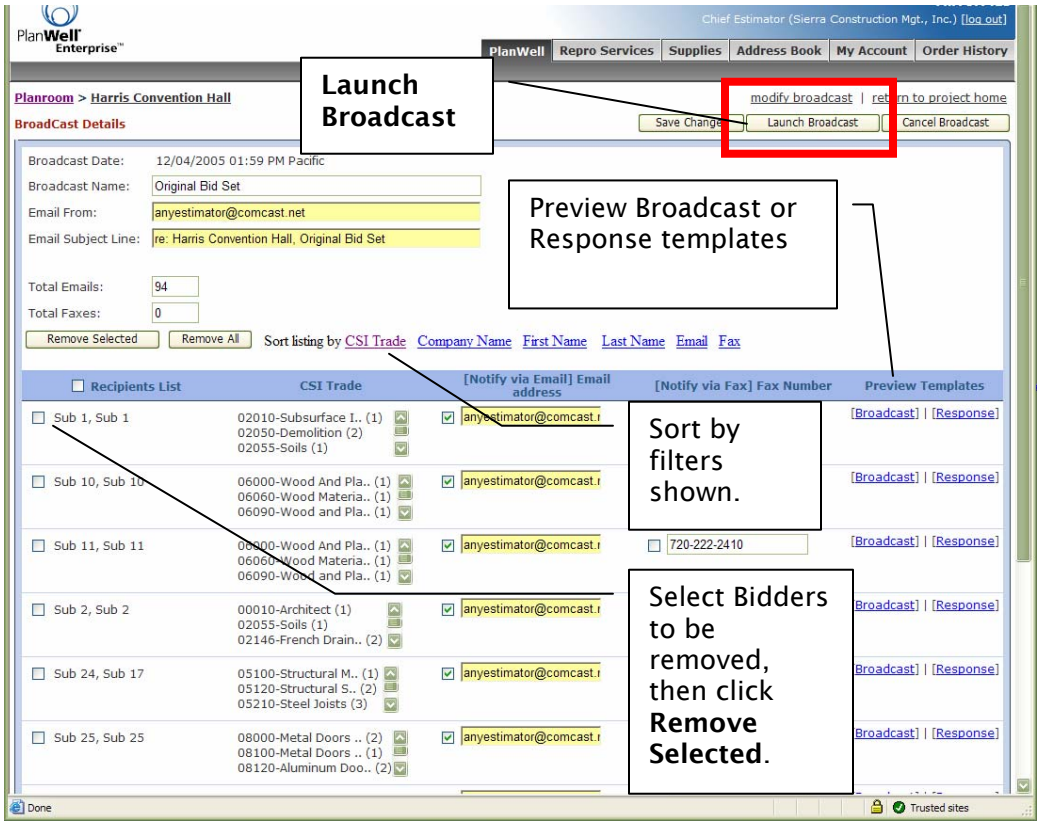
→ Click **Review & Submit**

Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid
Turn on Email Response Template: Default Response.htm
Forward Bid Acknowledgment to my email (additional charges may apply)
Check to Set Auto Reminder on (additional charges may apply)
Reminder Date:
Time: 12:00 AM
Auto-Reminder Template: Default Auto Reminder.htm
Review & Submit
Save Changes
Cancel
Click
Review & Submit

The **Broadcast Details** screen appears and provides a final review of all data before launching the broadcast. You may,

- → **Preview Templates** by clicking on either Broadcast or Response templates.
- → Sort by filters shown, i.e., CSI Trade, Company Name, etc.
- → Check box to **Remove selected Bidders** or **Remove All**.
- → Once ready, click **Launch Broadcast**

The broadcast is now officially launched.

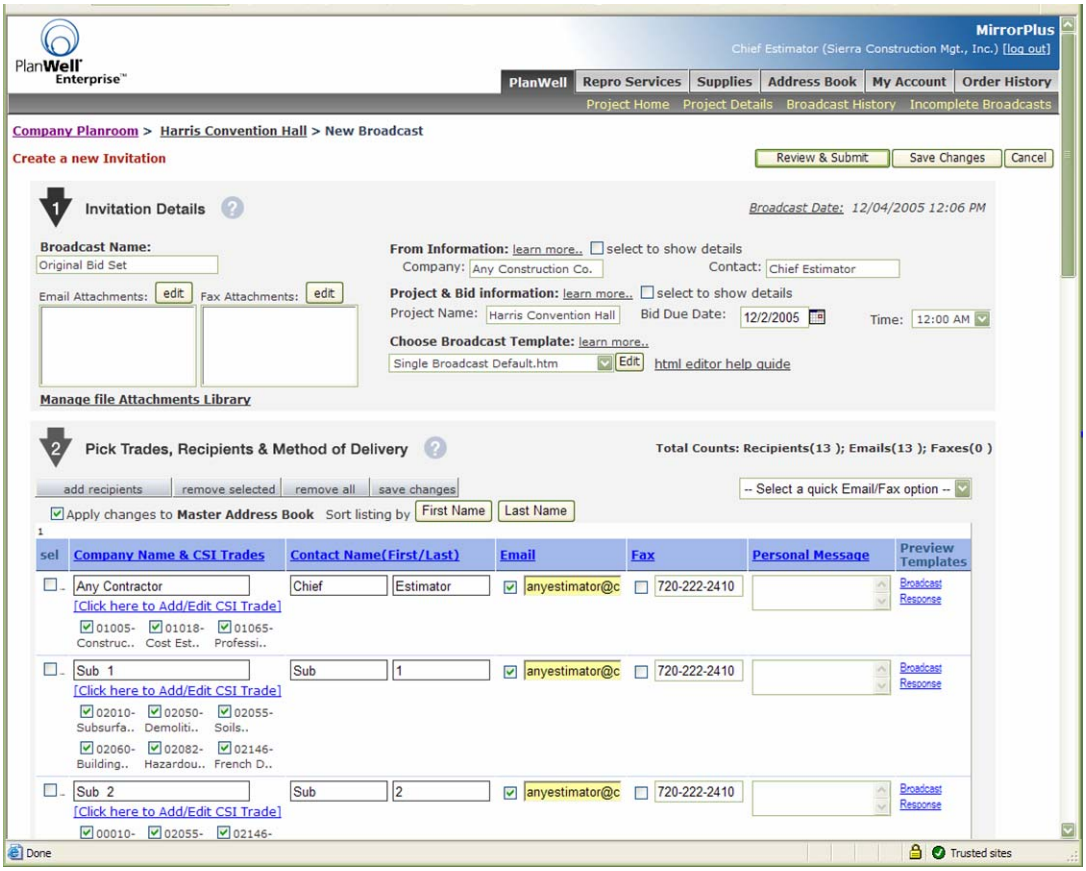


G. Interrupted Broadcasts

Estimating is an incredibly busy task…there are constant interruptions. If you are inadvertently logged off after 90 minutes of inactivity or purposely cancel a broadcast, any data entered in Broadcast Steps 1-3 will be saved for possible later use. This is accomplished by using the **Incomplete Broadcasts** tab. This is located,

- → Company Planroom → Broadcast History → Incomplete Broadcasts

A list of **Incomplete Broadcasts** will display. Simply click on a Broadcast name to pick up where you left off in the broadcast steps, ref. example below.



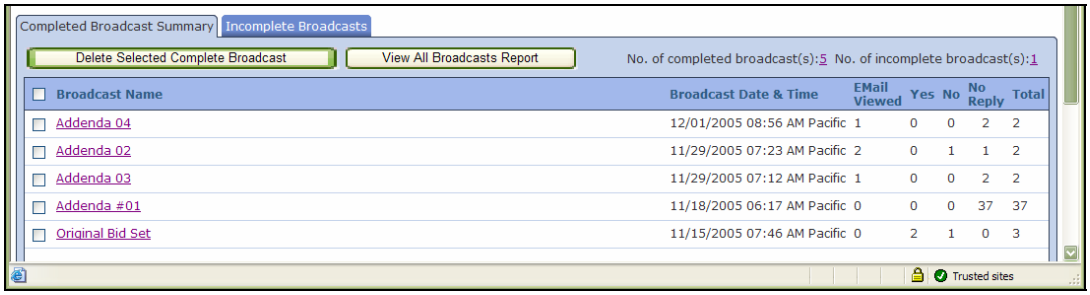
G. Deleting Broadcasts

Broadcasts can be deleted inside either the Completed Broadcast Summary or Incomplete Broadcasts tab.

→ Check box Broadcasts to be deleted.
→ Click **Delete Selected Complete Broadcasts**.

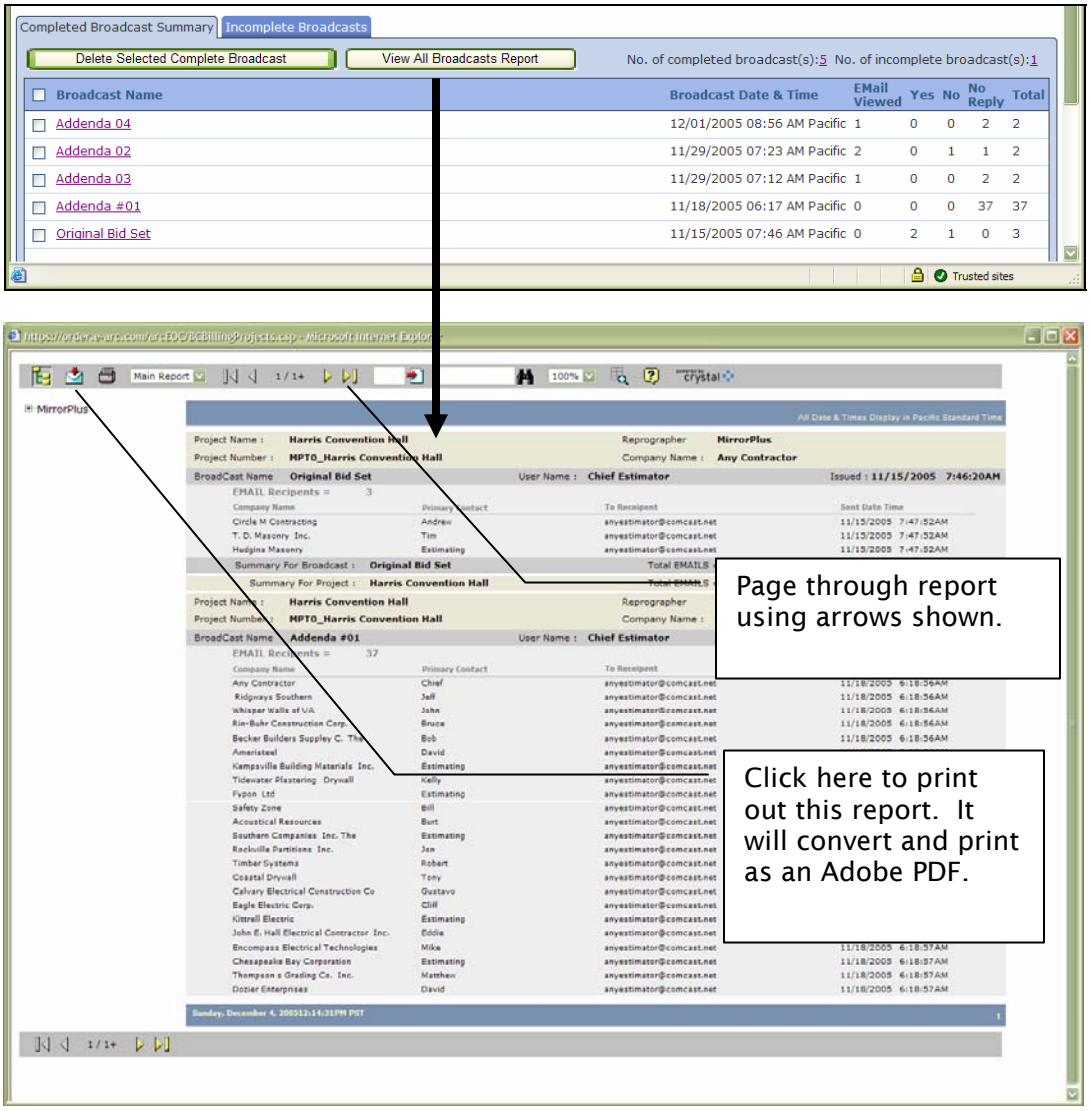
Or, inside Incomplete Broadcasts,

→ Click **Delete Selected Broadcast Drafts**.


Completed Broadcast Summary
Incomplete Broadcasts
Delete Selected Complete Broadcast
View All Broadcasts Report
No. of completed broadcast(s):5 No. of incomplete broadcast(s):1
Broadcast Name
Broadcast Date & Time
EMail Viewed
Yes
No
No Reply
Total
Addenda 04
12/01/2005 08:56 AM Pacific 1 0 0 2 2
Addenda 02
11/29/2005 07:23 AM Pacific 2 0 1 1 2
Addenda 03
11/29/2005 07:12 AM Pacific 1 0 0 2 2
Addenda #01
11/18/2005 06:17 AM Pacific 0 0 0 37 37
Original Bid Set
11/15/2005 07:46 AM Pacific 0 2 1 0 3
Trusted sites

H. View All Broadcast Report

This report provides information relating to date & time each broadcast was sent to individual recipient Bidders via email and/or fax.



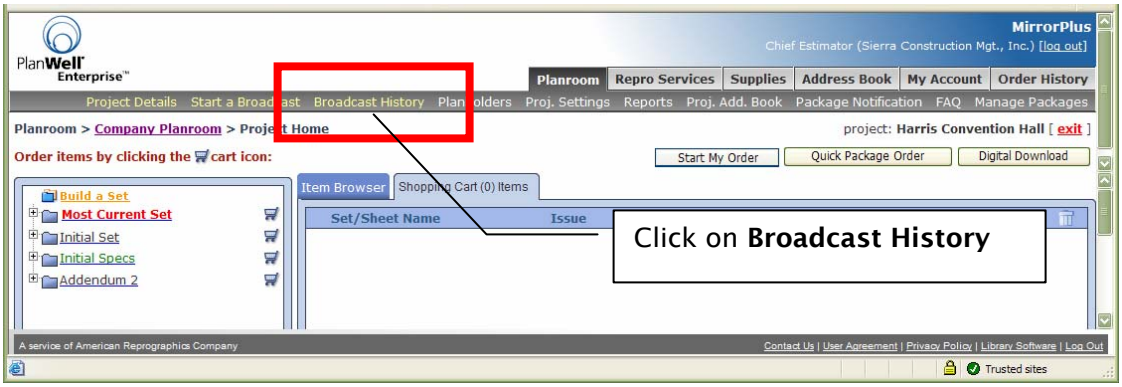
(End of Chapter 5)

Chapter 6- Broadcast Status Report

A. Completed Broadcast Summary Screen

After completing an Invitation to Bid (ITB) broadcast, the **Broadcast History** screen will display all **Broadcast Status Reports** (BSRs) for a particular project. To view, go to:

→ **Company Planroom → Broadcast History → Completed Broadcast Summary**



The Broadcast History screen now appears, ref. next screen below. It lists all broadcasts made to date for the project.

The Completed Broadcast Summary provides a quick overview of activity on different broadcasts, i.e.

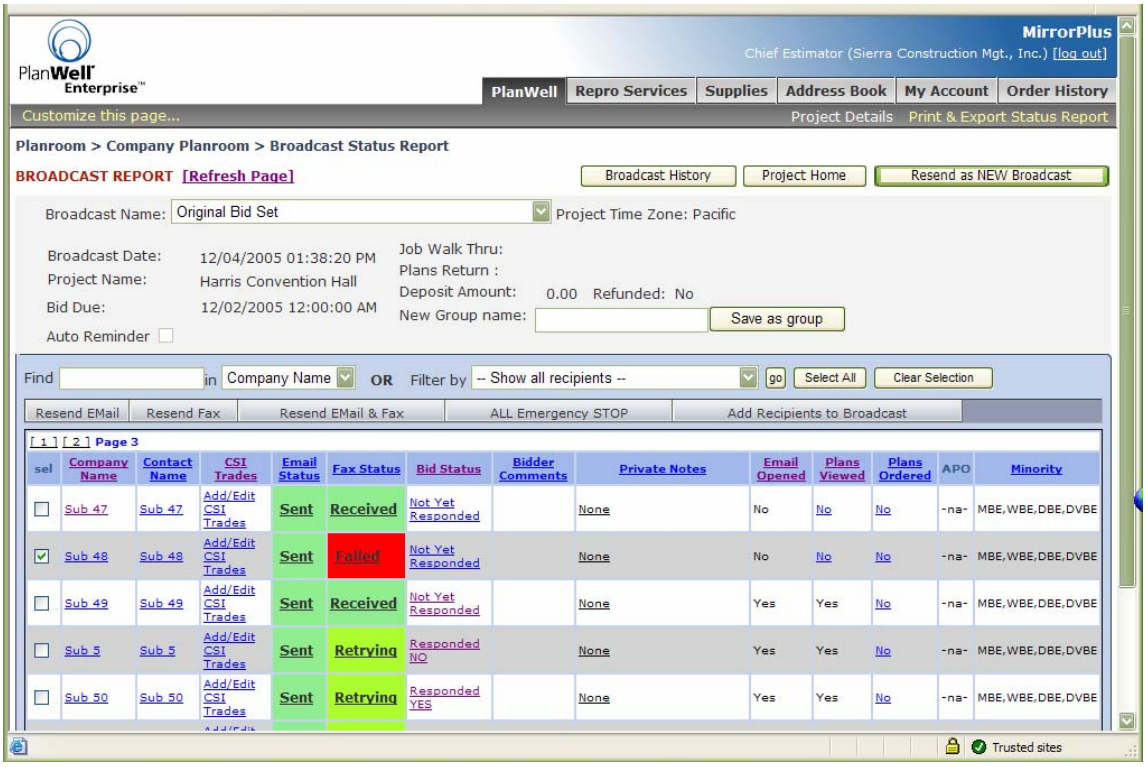
a. Broadcast Date & Time
b. Email Viewed: How many Emails were opened and viewed
c. Yes: How many "Yes" Bid Acknowledgments have been received to date.
d. No: How many "No" Bid Acknowledgments have been received to date.
e. No Reply: How many Bidders have not yet responded.
f. Total: The combined total of emails, faxes and No Replys to date.

Reference the following example:

→ Clicking on a **Broadcast Name** will open the **Broadcast Status Report** associated with that broadcast.

B. Broadcast Status Report - Overview

An example Broadcast Status Report can be seen below.


MirrorPlus
Chief Estimator (Sierra Construction Mgt., Inc.) [log out]
PlanWell Enterprise
PlanWell | Repro Services | Supplies | Address Book | My Account | Order History
Customize this page...
Project Details | Print & Export Status Report
Planroom > Company Planroom > Broadcast Status Report
BROADCAST REPORT [Refresh Page]
Broadcast History | Project Home | Resend as NEW Broadcast
Broadcast Name: Original Bid Set
Project Time Zone: Pacific
Broadcast Date: 12/04/2005 01:38:20 PM
Project Name: Harris Convention Hall
Bid Due: 12/02/2005 12:00:00 AM
Auto Reminder
Job Walk Thru:
Plans Return :
Deposit Amount: 0.00 Refunded: No
New Group name:
Save as group
Find in Company Name OR Filter by -- Show all recipients -- go Select All Clear Selection
Resend EMail | Resend Fax | Resend EMail & Fax | ALL Emergency STOP | Add Recipients to Broadcast
[1] [2] Page 3
sel | Company Name | Contact Name | CSI Trades | Email Status | Fax Status | Bid Status | Bidder Comments | Private Notes | Email Opened | Plans Viewed | Plans Ordered | APO | Minority
Sub 47 | Sub 47 | Add/Edit CSI Trades | Sent | Received | Not Yet Responded | | None | No | No | No | -na- | MBE,WBE,DBE,DVBE
Sub 48 | Sub 48 | Add/Edit CSI Trades | Sent | Failed | Not Yet Responded | | None | No | No | No | -na- | MBE,WBE,DBE,DVBE
Sub 49 | Sub 49 | Add/Edit CSI Trades | Sent | Received | Not Yet Responded | | None | Yes | Yes | No | -na- | MBE,WBE,DBE,DVBE
Sub 5 | Sub 5 | Add/Edit CSI Trades | Sent | Retrying | Responded NO | | None | Yes | Yes | No | -na- | MBE,WBE,DBE,DVBE
Sub 50 | Sub 50 | Add/Edit CSI Trades | Sent | Retrying | Responded YES | | None | Yes | Yes | No | -na- | MBE,WBE,DBE,DVBE
Trusted sites

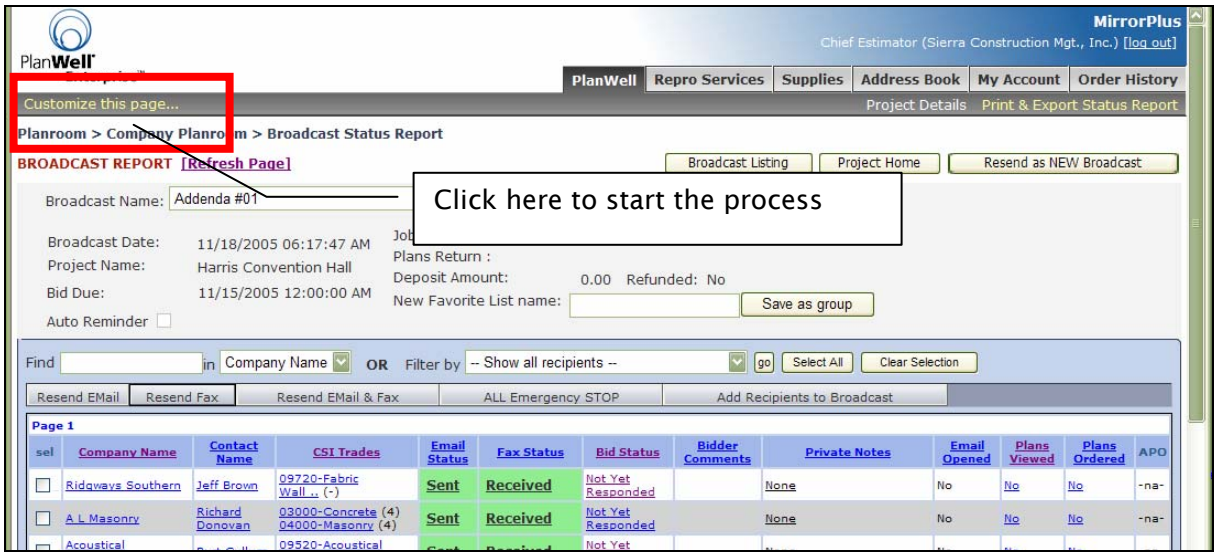
The Broadcast Status Report (BSR) has many features including:

- A new "**Customize this page..**" feature which allows custom display of different data fields.
- View email or fax status information.
- Ability to sort BSR information by Company Name, Contact Name, CSI Code or description.
- Ability to view/verify broadcast and response template sent to each Bidder.
- Ability to view Bidder Comments which are submitted by Bidders via the Bid Acknowledgment message.
- Ability to filter by Show only Yes responses, Show only No responses, Show only Pending Replies, Show Yes & Pending responses.
- Ability to see if/when someone has opened their email and accessed BidCaster.
- Ability to see if/when someone has viewed plans online from PlanWell.
- Ability to manually set the **Plans Viewed** status.
- Ability to see if/when someone has ordered plans online from PlanWell.
- Ability to manually set the **Plans Ordered** status.
- Ability to save Filter results to a Group name.
- Ability to **Add recipient bidders to Broadcast.**

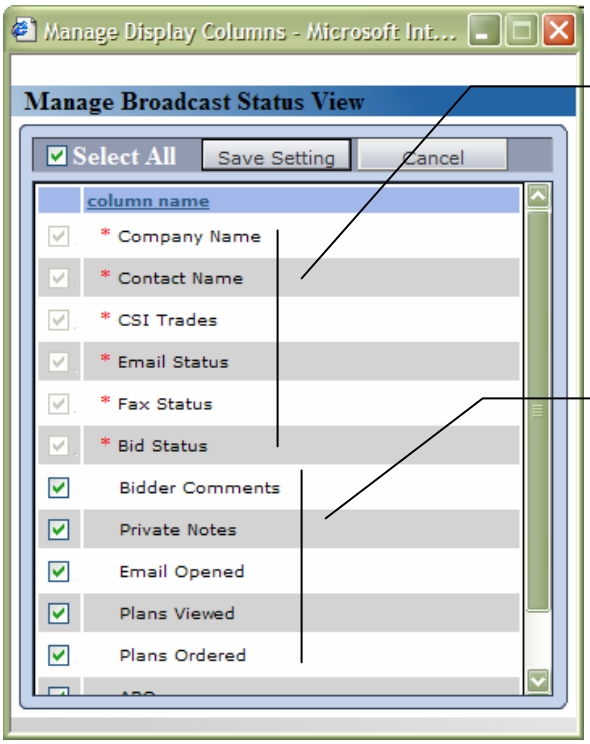
B. Customize this page…

This feature allows certain data fields to be turned on or off for easier display purposes.

→ Click on **Customize this page**…



The Manage Broadcast Status View appears, ref. next screen.



Red Asterisked (*) fields cannot be turned off as they are mandatory, therefore grayed out.

But all others can be turned on or off as desired.

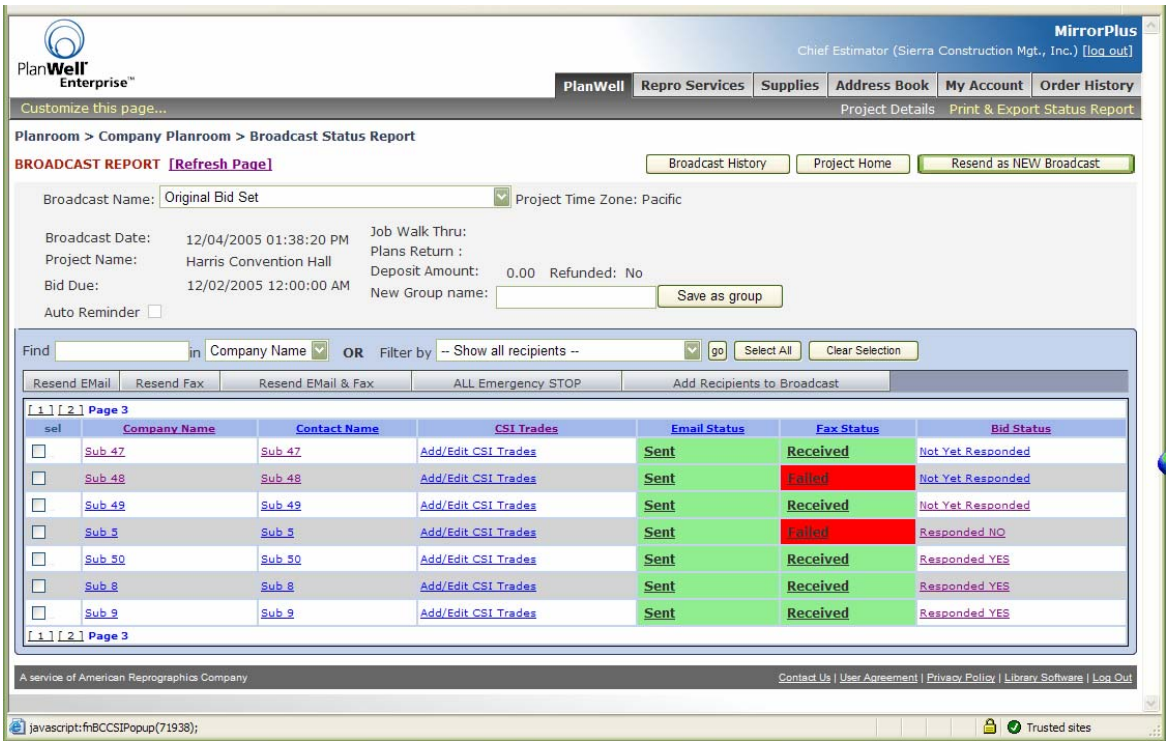
All these can be toggled on or off as desired.

Additional columns not shown are:

- APO
- Minority

→ Use Save Setting before exiting.

Here's how the BSR would look with the maximum number of data fields turned off, ref. next screen.


PlanWell Enterprise
MirrorPlus
Chief Estimator (Sierra Construction Mgt., Inc.) [log out]
PlanWell | Repro Services | Supplies | Address Book | My Account | Order History
Customize this page...
Project Details | Print & Export Status Report
Planroom > Company Planroom > Broadcast Status Report
BROADCAST REPORT [Refresh Page]
Broadcast History | Project Home | Resend as NEW Broadcast
Broadcast Name: Original Bid Set
Project Time Zone: Pacific
Broadcast Date: 12/04/2005 01:38:20 PM
Project Name: Harris Convention Hall
Bid Due: 12/02/2005 12:00:00 AM
Auto Reminder
Job Walk Thru:
Plans Return :
Deposit Amount: 0.00 Refunded: No
New Group name:
Save as group
Find in Company Name OR Filter by -- Show all recipients -- go Select All Clear Selection
Resend EMail | Resend Fax | Resend EMail & Fax | ALL Emergency STOP | Add Recipients to Broadcast
[1] [2] Page 3
sel | Company Name | Contact Name | CSI Trades | Email Status | Fax Status | Bid Status
Sub 47 | Sub 47 | Add/Edit CSI Trades | Sent | Received | Not Yet Responded
Sub 48 | Sub 48 | Add/Edit CSI Trades | Sent | Failed | Not Yet Responded
Sub 49 | Sub 49 | Add/Edit CSI Trades | Sent | Received | Not Yet Responded
Sub 5 | Sub 5 | Add/Edit CSI Trades | Sent | Failed | Responded NO
Sub 50 | Sub 50 | Add/Edit CSI Trades | Sent | Received | Responded YES
Sub 8 | Sub 8 | Add/Edit CSI Trades | Sent | Received | Responded YES
Sub 9 | Sub 9 | Add/Edit CSI Trades | Sent | Received | Responded YES
[1] [2] Page 3
A service of American Reprographics Company
Contact Us | User Agreement | Privacy Policy | Library Software | Log Out
javascript:fnBCCSIPopup(71938);
Trusted sites

C. Broadcast Status Report Column Descriptions

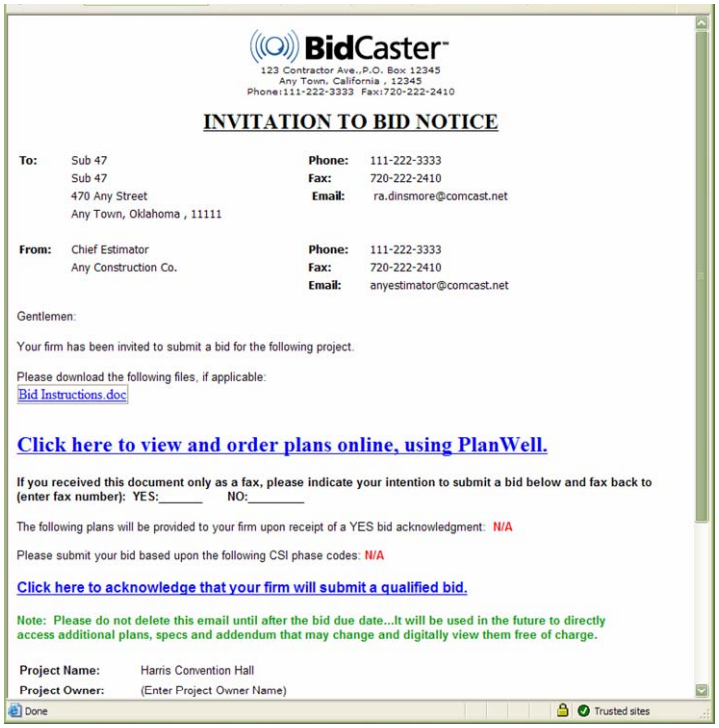
The following table describes column headers (from left to right) for data fields and a brief description of what detailed information is displayed. Clicking on links within cells also can display further additional detailed information.

Column Header	Description
Sel	Check individual bidders using the **Sel** column in order to: ▪ **Resend Email** ▪ **Resend Email & Fax** ▪ Use **All Emergency STOP** ▪ **Add Recipients to Broadcast**
Company Name	Clicking displays a copy of the Broadcast ITB sent to that Bidder.
Contact Name	Clicking allows first and last names to be edited and changed.
CSI Trades	Clicking allows viewing of full CSI Number, Descriptions and Ratings
Email Status	Clicking allows editing of email address and view date & time stamp info.
Email Fax Status	Clicking allows editing of fax number and view date & time stamp info.
Bid Status	Displays Yes/No/Pending. Clicking displays Bid Acknowledgement Message and allows manual Yes/No entries.
Bidder Comments	Displays comments entered as part of the Bid Acknowledgment message.
Private Notes	Allows Content Provider to enter and display confidential notes.
Email Opened	Displays a *YES* or *NO* based on if the bidder has opened email and clicked on the link to BidCaster.

Plans Viewed	Displays a *YES* or *NO* based on if the bidder has clicked the link to PlanWell and viewed project plans. This status can also be manually changed.
Plans Ordered	Displays a *YES* or *NO* based on if the bidder has accessed PlanWell and ordered plans. This status can also be manually changed.
APO	Displays APO Order for Assigned Print Orders paid by the Content Provider. Or –na- when this option is not exercised. Clicking opens the print order for viewing.
Minority Status	Displays the minority status (MBE, WBE, DBE, DVBE, Fed8a)

D. Viewing the Broadcast Template sent to Bidders inside the BSR

→ Clicking on any **Company Name** will open the specific Broadcast Template sent to that Bidder



BidCaster™
123 Contractor Ave.,P.O. Box 12345
Any Town, California , 12345
Phone:111-222-3333 Fax:720-222-2410

INVITATION TO BID NOTICE

To: Sub 47
Sub 47
470 Any Street
Any Town, Oklahoma , 11111

Phone: 111-222-3333
Fax: 720-222-2410
Email: ra.dinsmore@comcast.net

From: Chief Estimator
Any Construction Co.

Phone: 111-222-3333
Fax: 720-222-2410
Email: anyestimator@comcast.net

Gentlemen:

Your firm has been invited to submit a bid for the following project.

Please download the following files, if applicable:
Bid Instructions.doc

Click here to view and order plans online, using PlanWell.

If you received this document only as a fax, please indicate your intention to submit a bid below and fax back to (enter fax number): YES:_____ NO:_____

The following plans will be provided to your firm upon receipt of a YES bid acknowledgment: N/A

Please submit your bid based upon the following CSI phase codes: N/A

Click here to acknowledge that your firm will submit a qualified bid.

Note: Please do not delete this email until after the bid due date...It will be used in the future to directly access additional plans, specs and addendum that may change and digitally view them free of charge.

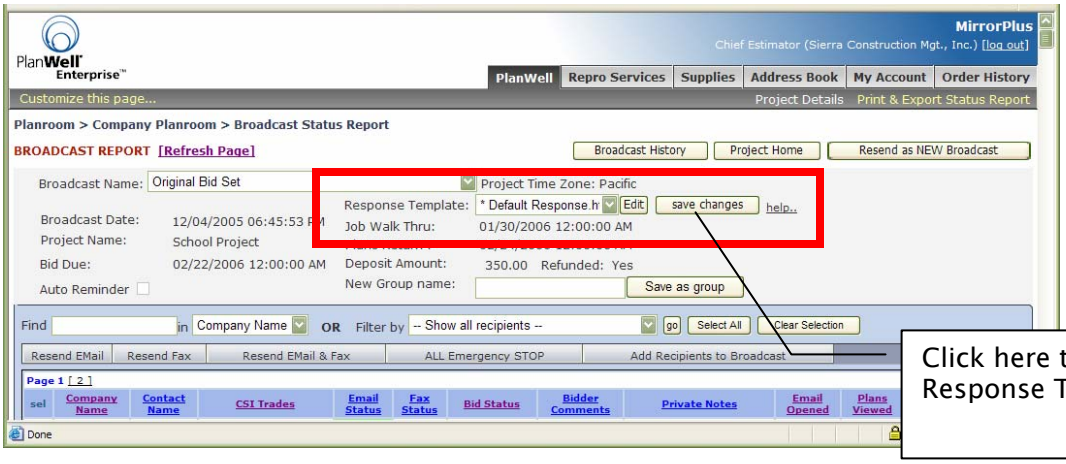
Project Name: Harris Convention Hall
Project Owner: (Enter Project Owner Name)

Done Trusted sites

E. Viewing the Response Template sent to Bidders inside the BSR

The pre-requisite to viewing a Response template is that you must have used the Double Template Approach, i.e., a Response Template was used in the broadcast. Then the Response Template appears as shown below.

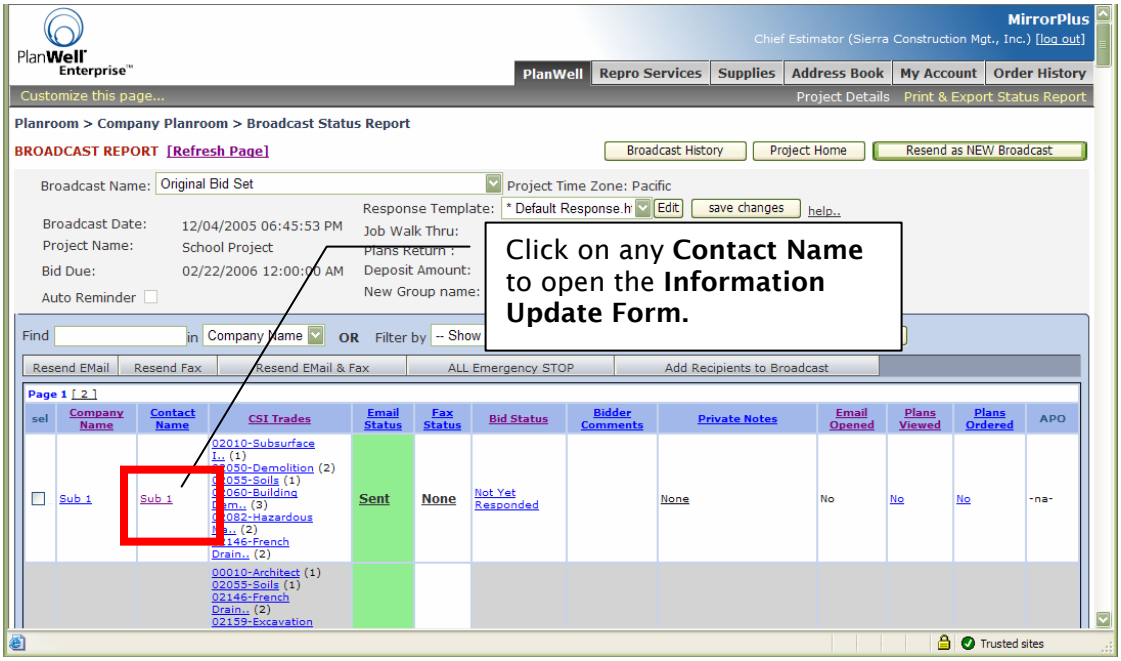
→ Click Edit to open the Response Template.



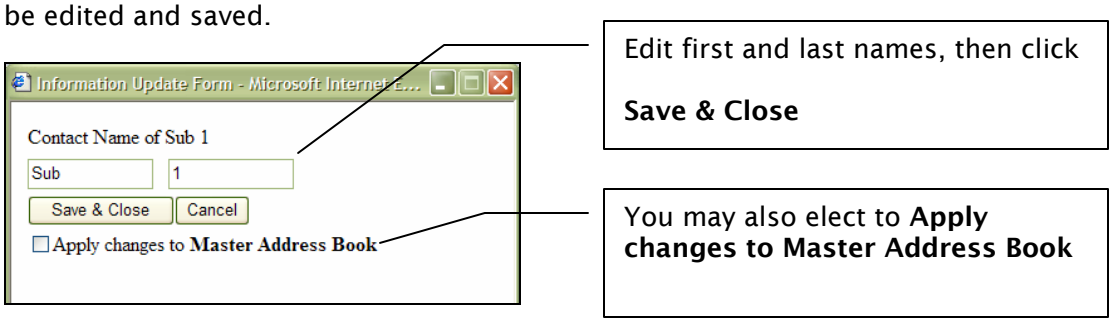
F. Change a Contact Name in the BSR

A contact name can be edited within the BSR by,

→ Click on a **Contact Name**

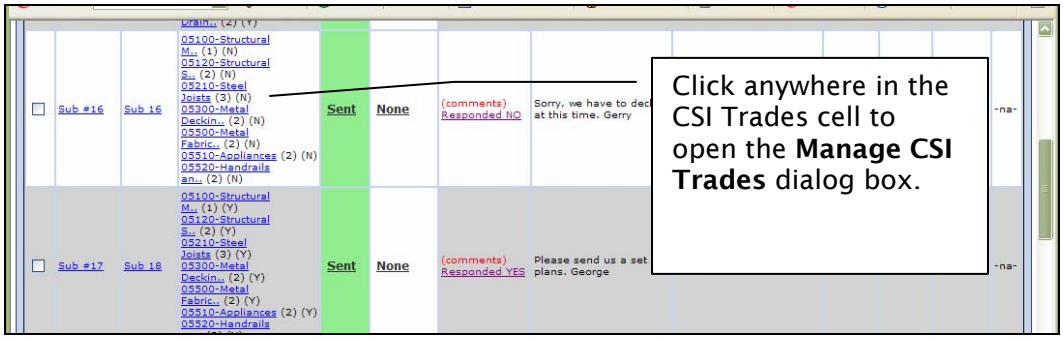


This opens the **Information Update Form** in which the first and last names of the contact can be edited and saved.

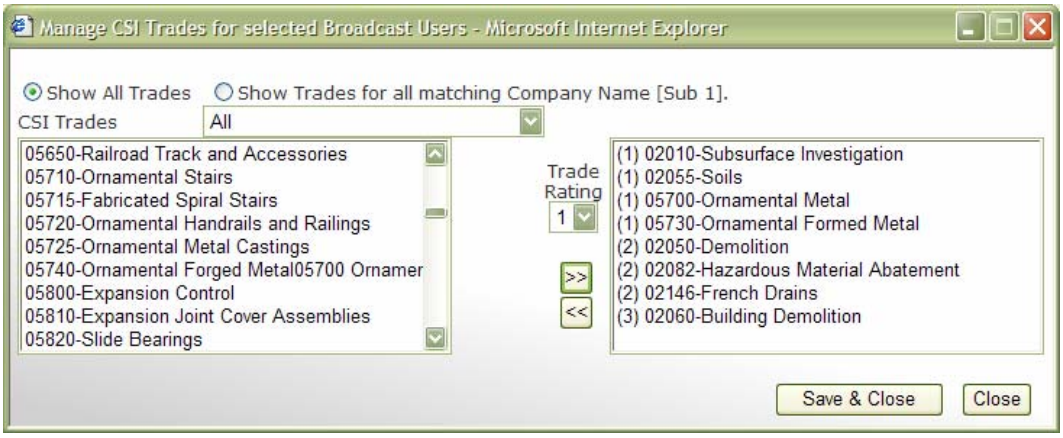

Information Update Form - Microsoft Internet E...
Contact Name of Sub 1
Sub
1
Save & Close
Cancel
Apply changes to Master Address Book
Edit first and last names, then click
Save & Close
You may also elect to **Apply changes to Master Address Book**

G. Viewing CSI Trades within the BSR

→ Click anywhere inside **CSI Trades** for a specific Bidder

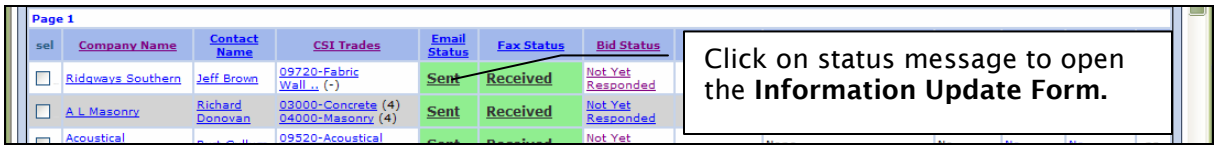


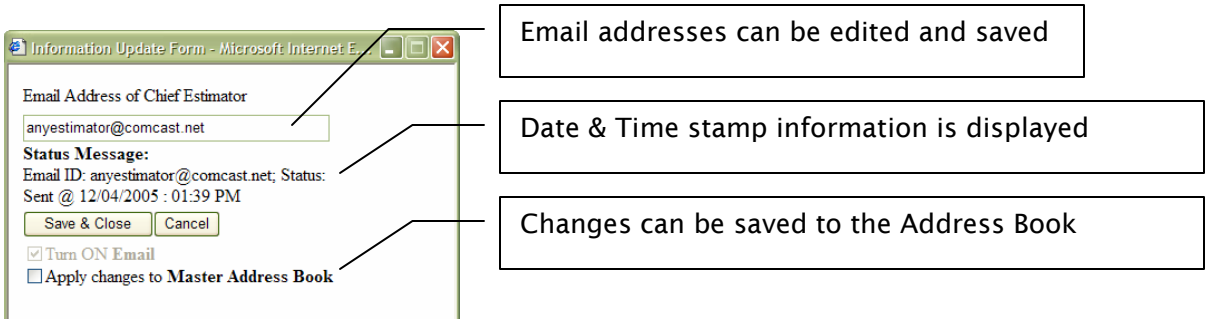
This opens the **Manage CSI Trades** dialog box, ref. next screen, where a User can view all selected CSI phase codes along with Rating information.



I. Viewing Email Status Details within the BSR

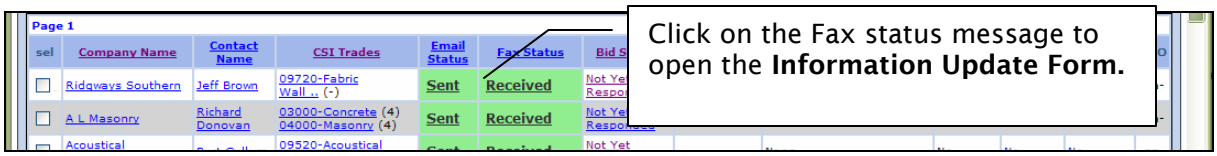
→ Click on **Email Status** information for a specific Bidder.

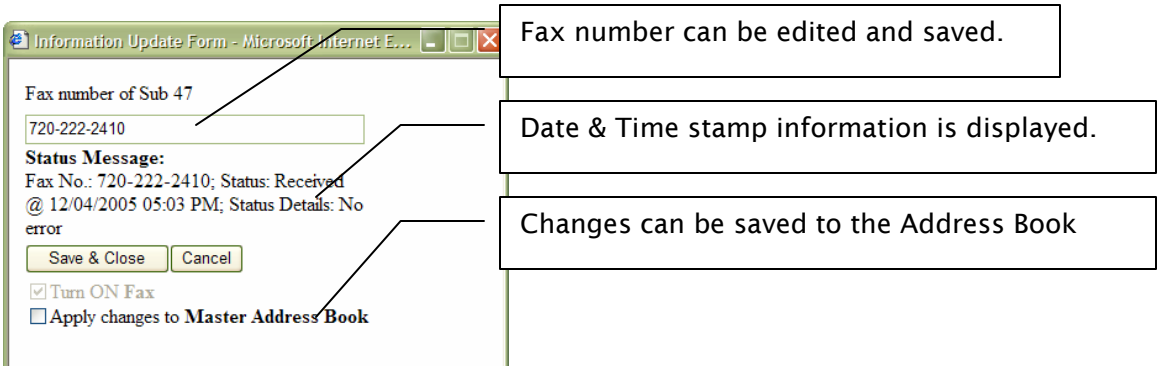



Information Update Form - Microsoft Internet E...
Email Address of Chief Estimator
anyestimator@comcast.net
Status Message:
Email ID: anyestimator@comcast.net; Status:
Sent @ 12/04/2005 : 01:39 PM
Save & Close
Cancel
Turn ON Email
Apply changes to Master Address Book
Email addresses can be edited and saved
Date & Time stamp information is displayed
Changes can be saved to the Address Book

J. Viewing Fax Status Details within the BSR

→ Click on **Fax Status** information for a specific Bidder.

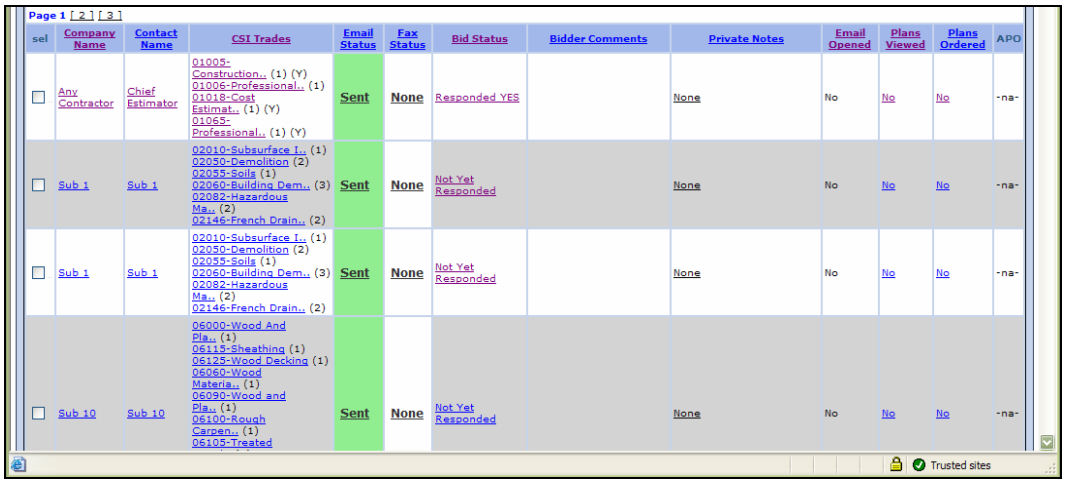



Information Update Form - Microsoft Internet E...
Fax number of Sub 47
720-222-2410
Status Message:
Fax No.: 720-222-2410; Status: Received @ 12/04/2005 05:03 PM; Status Details: No error
Save & Close
Cancel
Turn ON Fax
Apply changes to Master Address Book
Fax number can be edited and saved.
Date & Time stamp information is displayed.
Changes can be saved to the Address Book

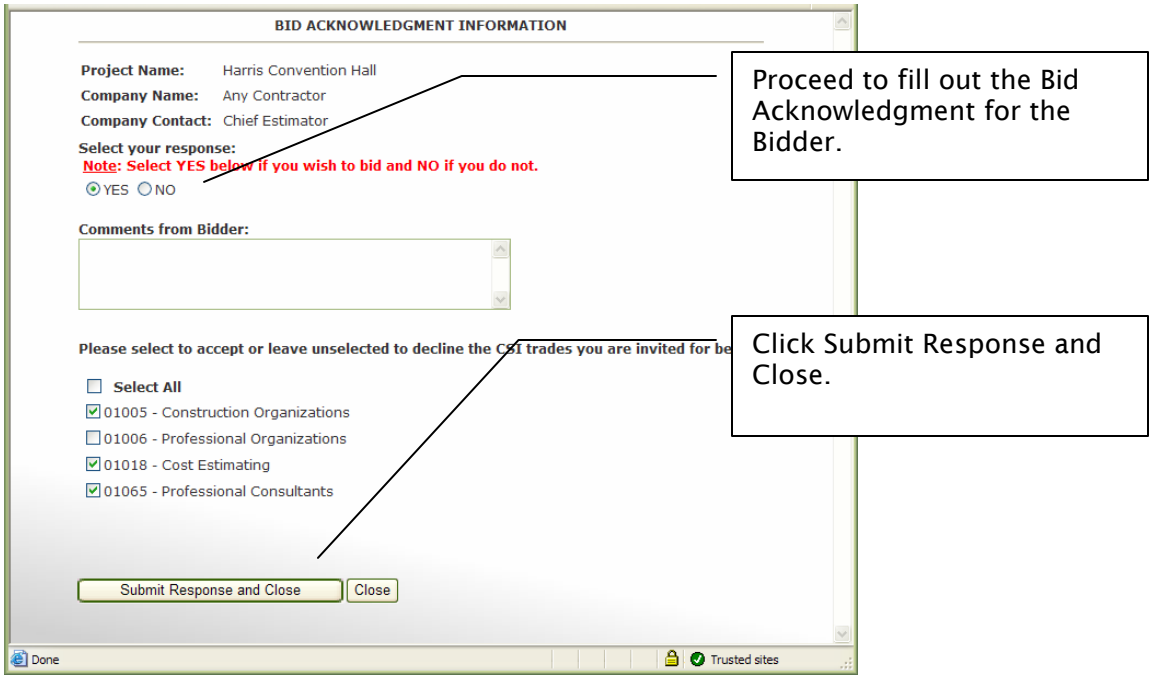
K. Manually Generating a Bidder Response within the BSR

For those bidders who receive faxed ITBs, the reply from the bidder will likely come as a phone call to the content provider. BidCaster™ provides a mechanism for generating a response on behalf of the bidder directly from the BSR.

→ Click on **Bid Status** that reads **Not Yet Responded** for a specific Bidder.



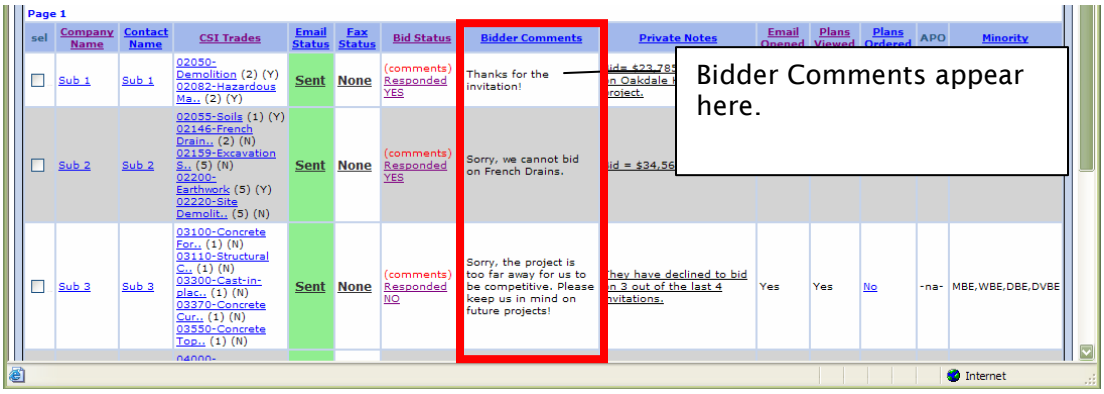
This will open the **Bid Acknowledgement Message** for this Bidder, ref. next screen.


BID ACKNOWLEDGMENT INFORMATION
Project Name: Harris Convention Hall
Company Name: Any Contractor
Company Contact: Chief Estimator
Select your response:
Note: Select YES below if you wish to bid and NO if you do not.
YES NO
Comments from Bidder:
Please select to accept or leave unselected to decline the CSI trades you are invited for be
Select All
01005 - Construction Organizations
01006 - Professional Organizations
01018 - Cost Estimating
01065 - Professional Consultants
Submit Response and Close
Close
Done
Trusted sites
Proceed to fill out the Bid Acknowledgment for the Bidder.
Click Submit Response and Close.

The Yes/No Bid Acknowledgment information will then display inside the BSR.

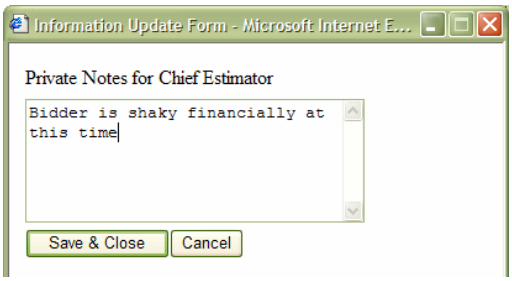
L. Bidder Comments within the BSR

These are comments provided by Bidders using the Bid Acknowledgment submittal process, ref. example below. There is nothing for the Content Provider to do but read them.

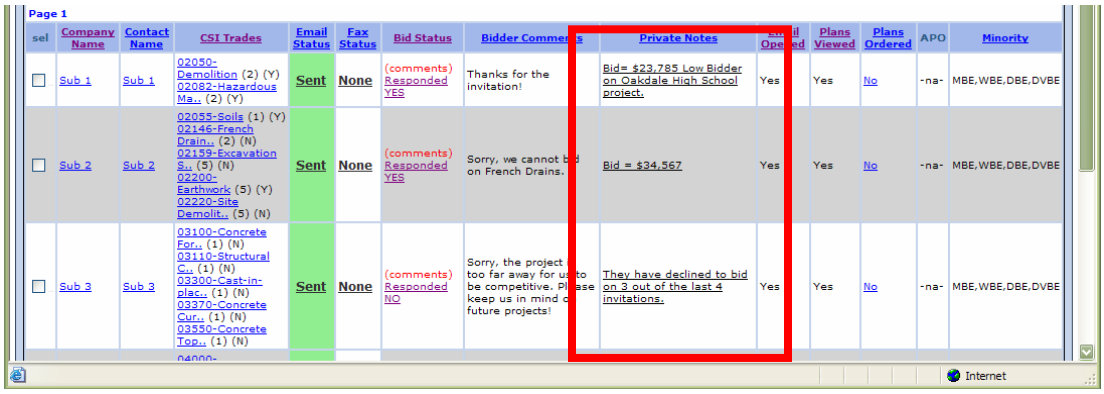


M. Private Notes inside the BSR

To add brief notes regarding a specific Bidder, click on the **Private Notes** text which initially displays as **None**. **Private Notes** will change to an edit field allowing you to type brief, but sufficient comments. This is an especially valuable tool on Bid Day where bids can be entered and tracked very easily.


Information Update Form - Microsoft Internet E...
Private Notes for Chief Estimator
Bidder is shaky financially at this time
Save & Close
Cancel

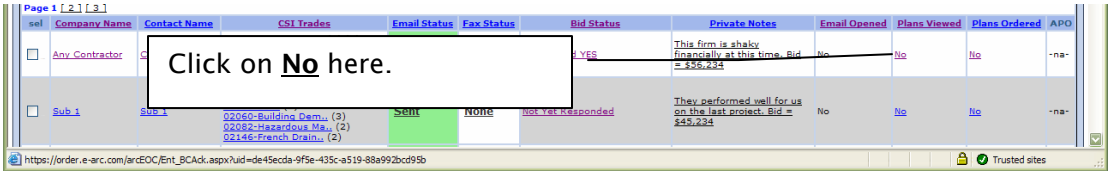
Once saved, this information will display inside the BSR, ref. next screen.



N. Plans Viewed details inside the BSR

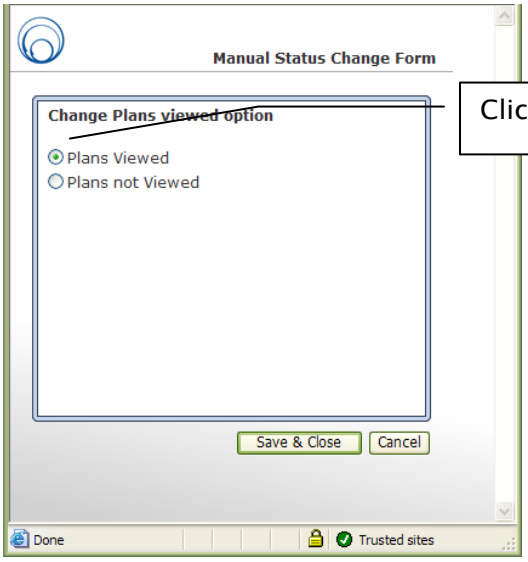
Plans Viewed is based upon access into PlanWell by Bidders using the [POL_Message] tag link. Once they enter PlanWell to view plans, a "Yes" displays in this column. There are times when a General Contractor is providing plans to a Bidder, free of charge and therefore wishes to toggle Plans Viewed to Yes. A Content Provider can manually toggle this to read "Yes" by,

→ Click on **No** under **Plans Viewed** for a specific Bidder.



This opens the **Manual Status Change Form** where a Content Provide can

→ Click on the **Plans Viewed** radial button.



→ Then click **Save & Close.** **Plans Viewed** will now display with a "Yes".

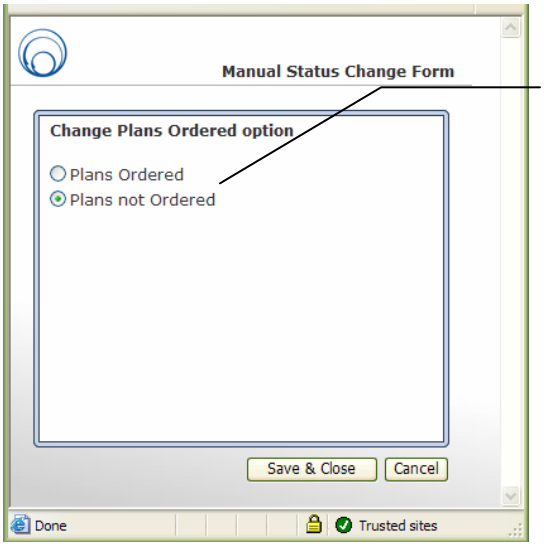
O. Plans Ordered details inside the BSR

Plans Ordered operates very similar to Plans Viewed. Both can be toggled to read "Yes" or "No" by Content Providers for the same reasons explained above.

→ Click on **No** under **Plans Ordered** for any specific Bidder.

The **Manual Status Change Form** opens.

→ Click on the **Plans Ordered** radial button.



→ Then click **Save & Close.**

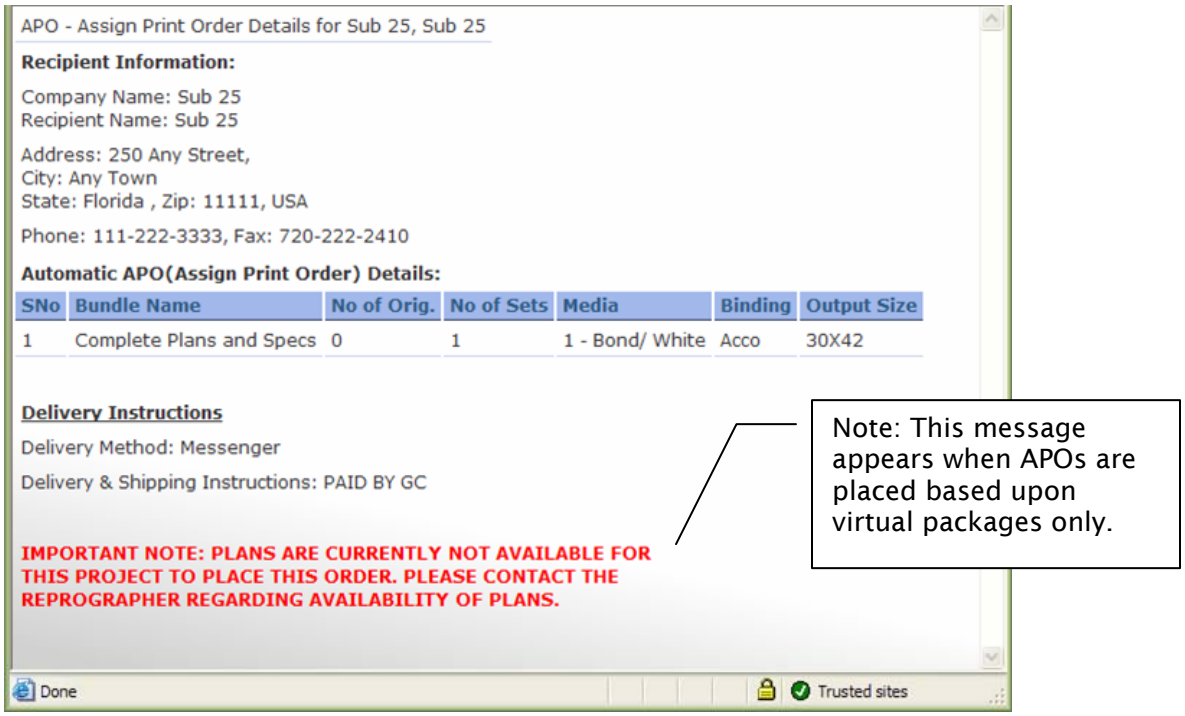
Plans Ordered will now display with a "Yes" inside the BSR.

P. APO Details inside the BSR

Again, the **APO (Assigned Print Order)** process is where a Content Provider such as a general contractor arranges to pay for prints to a select group of Bidders (typically his "A" Team). Inside the BSR in the **APO** column they appear as **APO Orders**, ref. example below.

→ Click on any **APO Order**,

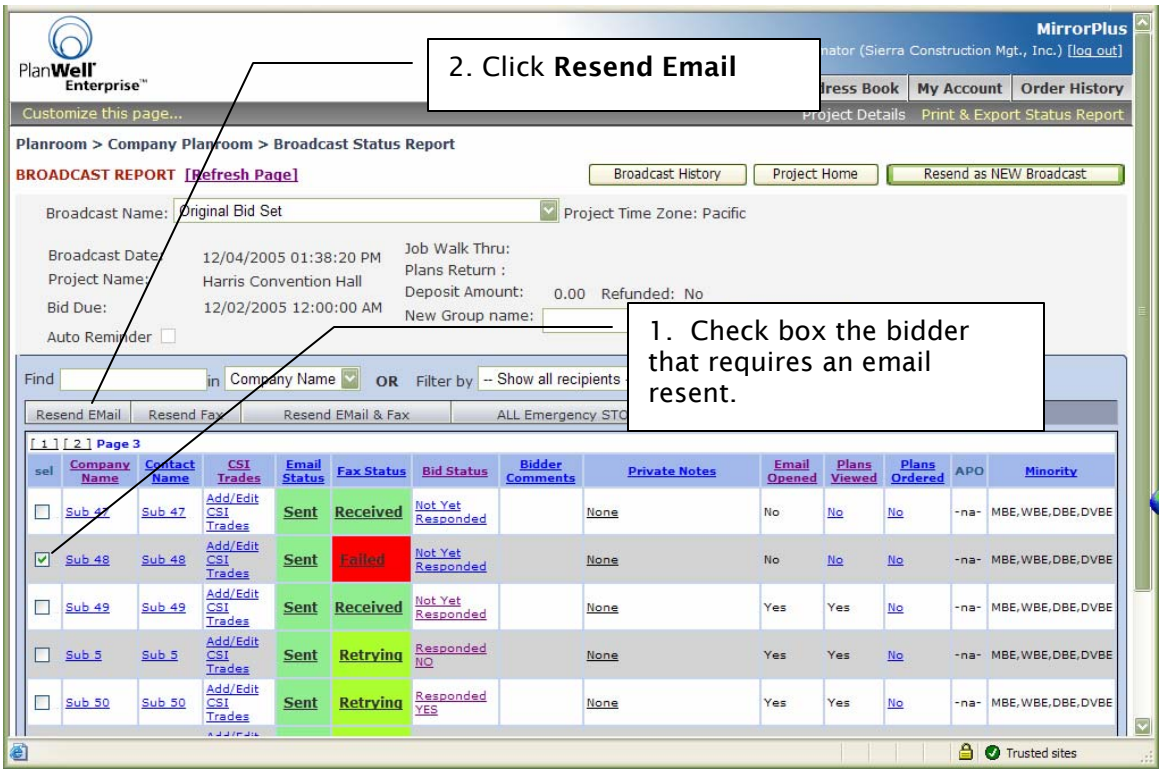
The **Assign Print Order Details** screen appears tailored for the specific Bidder, ref. example below.


APO - Assign Print Order Details for Sub 25, Sub 25
Recipient Information:
Company Name: Sub 25
Recipient Name: Sub 25
Address: 250 Any Street,
City: Any Town
State: Florida , Zip: 11111, USA
Phone: 111-222-3333, Fax: 720-222-2410
Automatic APO(Assign Print Order) Details:
SNo
Bundle Name
No of Orig.
No of Sets
Media
Binding
Output Size
1
Complete Plans and Specs
0
1
1 - Bond/ White
Acco
30X42
Delivery Instructions
Delivery Method: Messenger
Delivery & Shipping Instructions: PAID BY GC
IMPORTANT NOTE: PLANS ARE CURRENTLY NOT AVAILABLE FOR THIS PROJECT TO PLACE THIS ORDER. PLEASE CONTACT THE REPROGRAPHER REGARDING AVAILABILITY OF PLANS.
Note: This message appears when APOs are placed based upon virtual packages only.
Done
Trusted sites

Q. Resend Emails inside the BSR

Although emails are very reliable, especially when compared with faxes, occasionally you will observe a Failed message appear inside the BSR. After verifying that the email is correct or corrected, resending emails is a very simple process.

→ Check box under **Sel** all bidders who have a Failed Message for emails.
→ Click on **Resend Email**

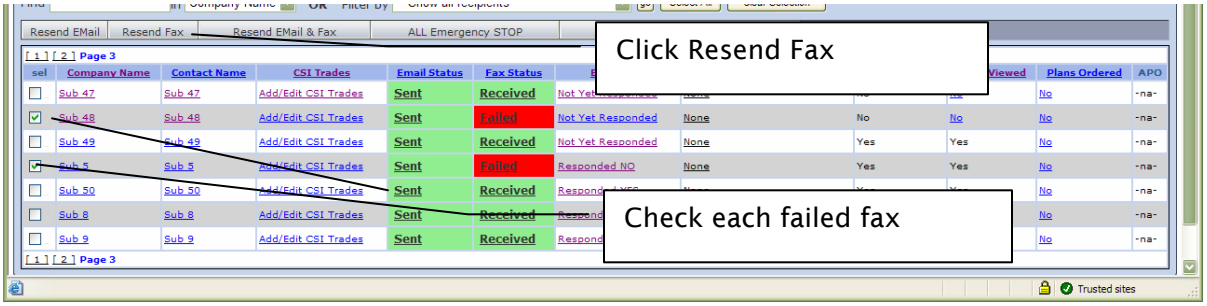

2. Click Resend Email
1. Check box the bidder that requires an email resent.
Resend EMail
Resend Fax
Resend EMail & Fax
ALL Emergency STOP

The program will immediately begin the process of resending the email.

R. Resend Fax inside the BSR

In a similar manner as resending an email, proceed to resend a fax, but first correct the fax number if required.

→ Check Box under Sel all bidders who have a Failed Message for emails.
→ Click on Resend Fax

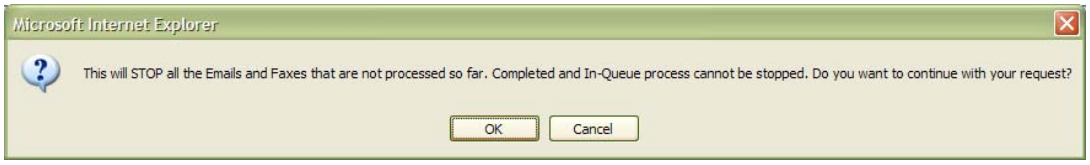


The program will immediately begin the process of resending the fax.

S. Resend Email & Fax
The process is identical to resending an email and fax, with the exception that a Content Provider will click on the **Resend Email & Fax** button.

T. All Emergency STOP
This button is reserved for emergencies, typically those involving faxes that are being sent that have mistakes somewhere on the templates. If a Content Provider wants to stop all emails and faxes that are being sent in a broadcast, they need to act swiftly. Most emails will be sent in a few minutes…they are that fast. Faxes are slower but BidCaster uses the most advanced and fastest fax technology available. BidCaster cannot guarantee that most faxes will still not go out, but catching the error early is the key. When that happens,

→ Click **All Emergency STOP.**

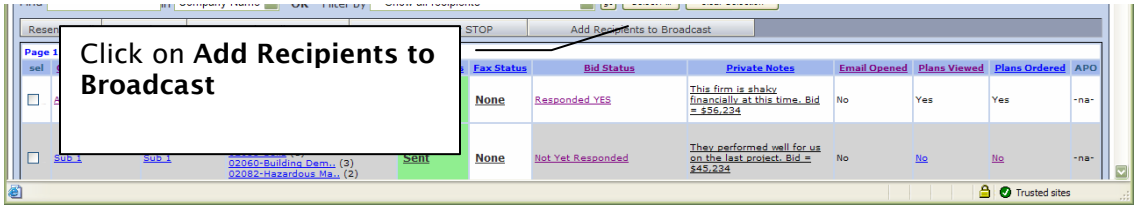

Microsoft Internet Explorer
This will STOP all the Emails and Faxes that are not processed so far. Completed and In-Queue process cannot be stopped. Do you want to continue with your request?
OK
Cancel

→ Click OK to continue with **All Emergency STOP**

The program will immediately cease processing and sending out remaining emails and faxes. You will typically see how many were stopped by looking at the BSR associated with the broadcast.

U. Add Recipients to Broadcast
This is a powerful new feature that allows a Content Provider such as a general contractor to add, for instance, "late" bidders to a previous broadcast. This is again, a simple process as follows:

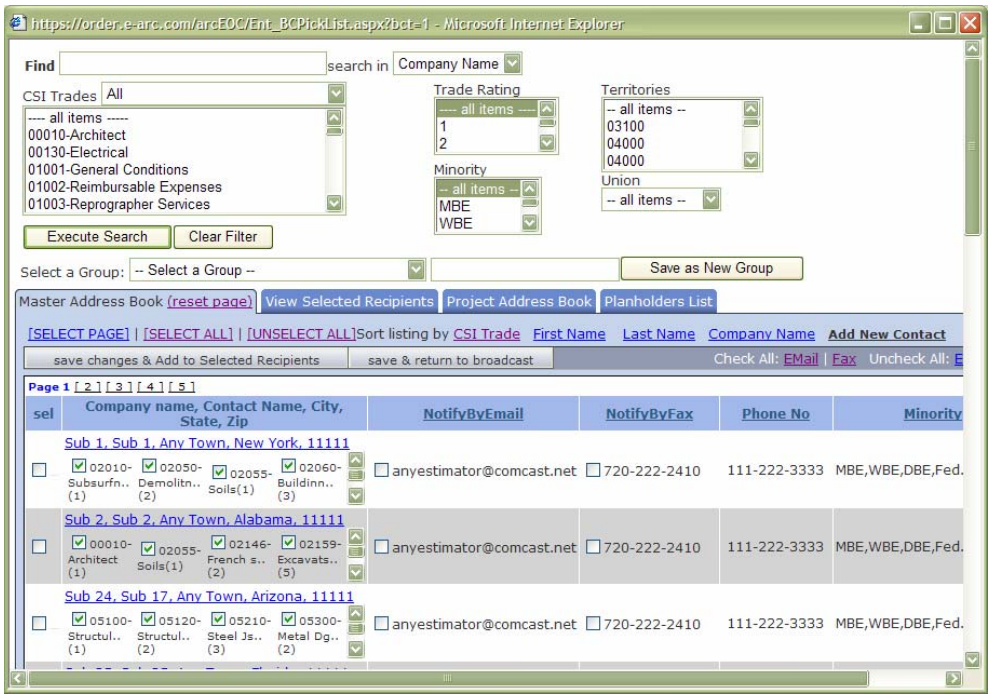
→ Click **Add Recipients to Broadcast**



The following screen appears,

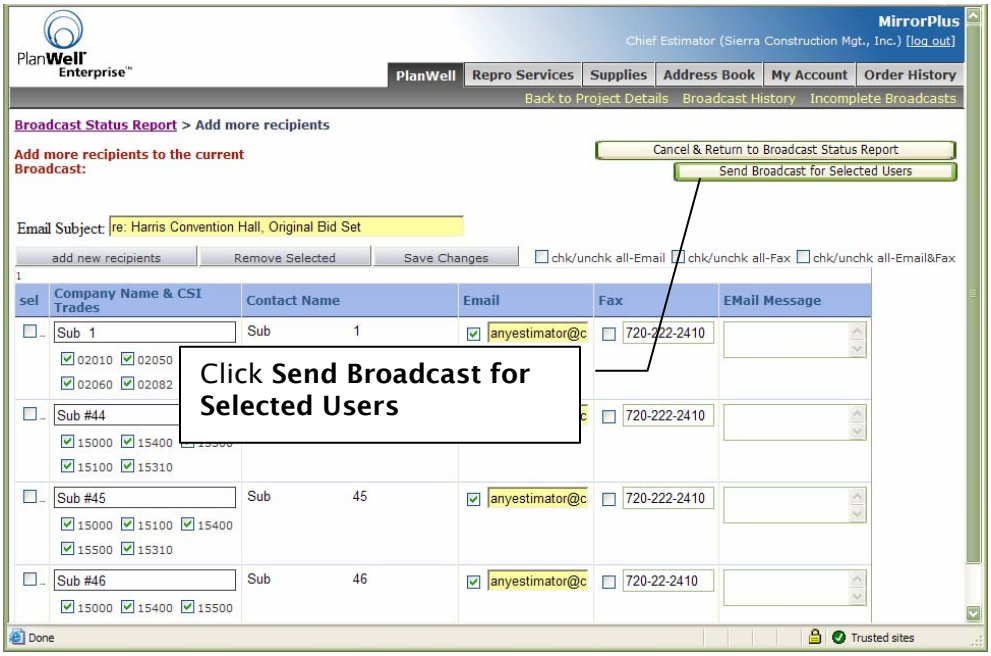
→ Click on **add new recipients**

The standard **Step 2 'add recipient'** search engine screen appears. Proceed to add bidders as required using this process as described under **Chapter 4, Working with an Address Book**, ref. next screen.



Once bidders are selected above,

→ Click **Save & return to broadcast**



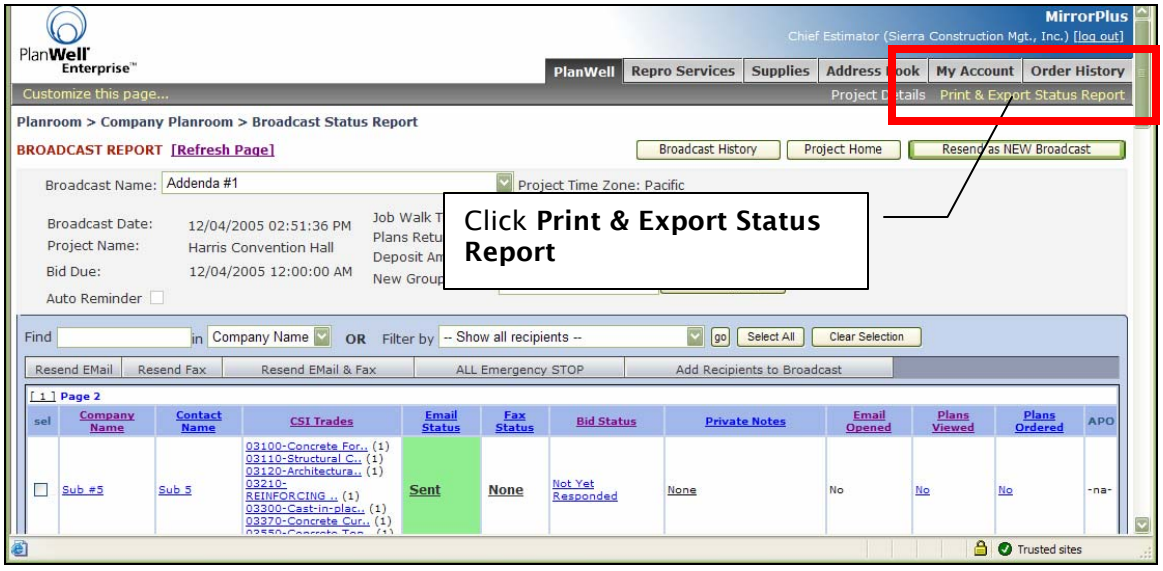
→ Click **Send Broadcast for Selected Users**

The additional bidders will now be added to the existing broadcast and appear inside the BSR.

V. Print & Export Status Report

This process allows the BSR to be sorted and printed.

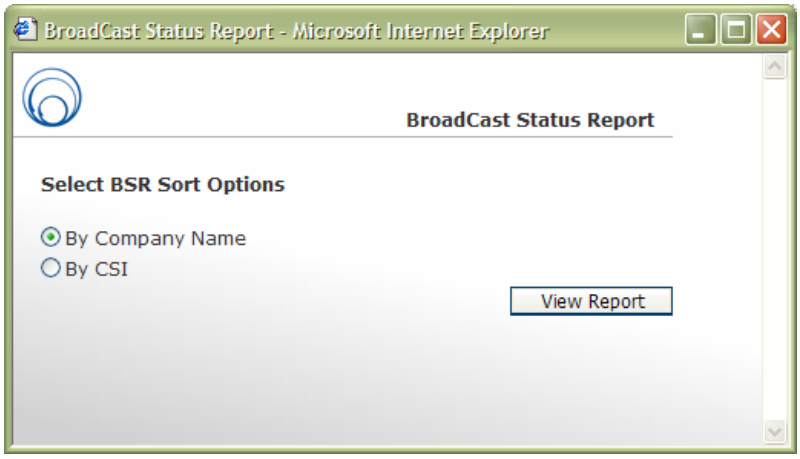
→ Click **Print & Export Status Report**



The Select BSR Sort Options dialog box appears, ref. next screen.

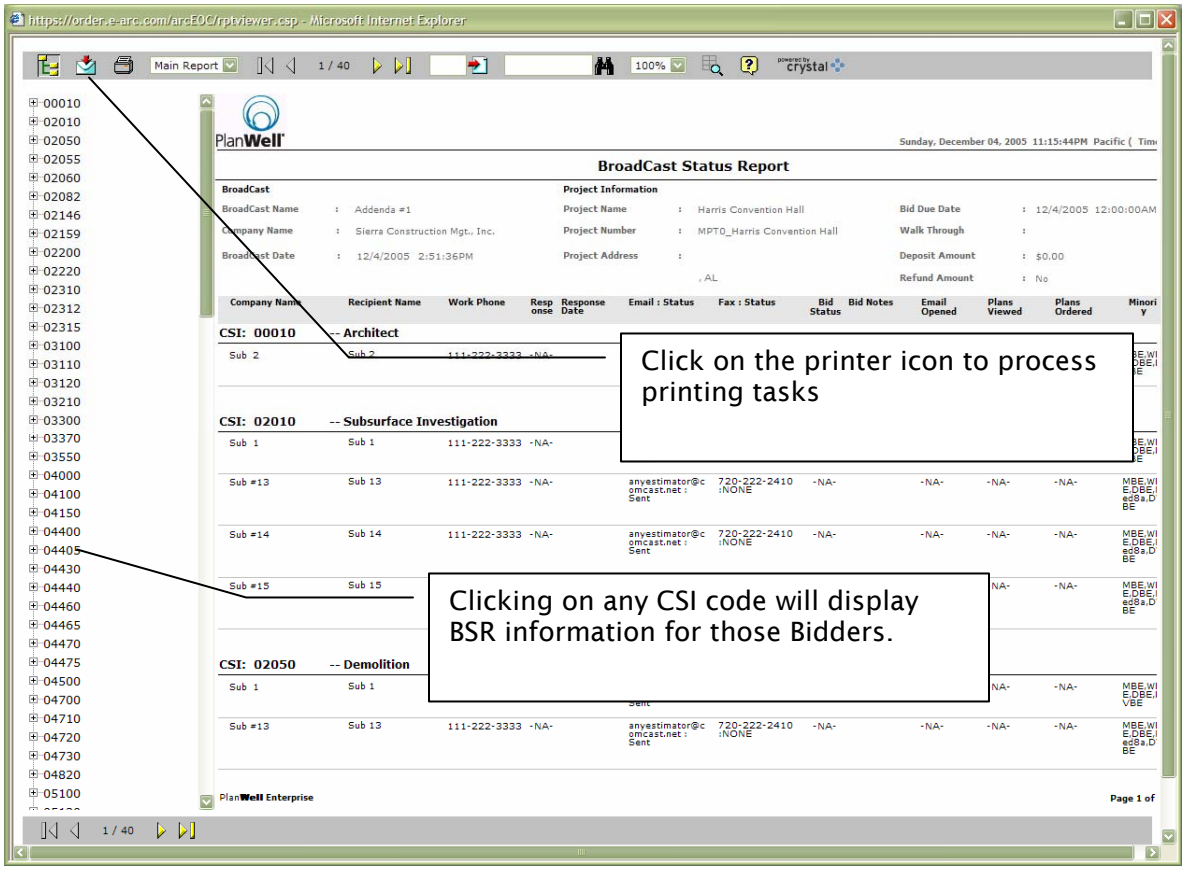
→ Click to sort by **Company Name or by CSI Trades**

→ Click on **View Report**



This triggers the Broadcast Status Report to appear as a Crystal Reports file.

→ Click on print icon to print the report


BroadCast Status Report
Click on the printer icon to process printing tasks
Clicking on any CSI code will display BSR information for those Bidders.

(End of Chapter 6)

Appendices

Appendix A, Frequently Asked Questions (FAQ)

1) How much does BidCaster™ cost and who pays?
   a) It's free to invited Bidders. There is no annual subscription fee.
   b) PlanWell is also a freely accessible internet store, no registration is necessary.
   c) Content Providers such as General Contractors, Architects, and Owners typically pay all costs relating to its use. Such costs are typically included in the cost-per-square-foot of construction documents ordered. Contact your nearest American Reprographics Division to obtain pricing tailored for your specific company.
2) What software is required?
   a) Content Providers must use Microsoft Internet Explorer 6.0.
   b) Files intended to be faxed require the installation of a free thin-client print-to-fax driver called "BidCaster". Note, contact your BidCaster/PlanWell Provider first for the installation password.
   c) Note: Bidders may use any browser of choice and are not limited to Explorer 6.0!
   d) An internet account.
3) What hardware is required?
   a) A common, everyday PC. Sorry, Apple PCs are not compatible.
   b) We recommend a DSL or cable modem for faster viewing and flipping through plans online.
4) Are Bidder Lists kept confidential?
   a) Absolutely and at all times. They are never shared with any 3rd party firm without a customer's written, express approval.
5) Can ITB emails be forwarded to other Bidders who were not invited? If so, Why?
   a) Yes. The primary reason is that Subcontractors will typically want to conveniently forward these to Suppliers who will be preparing and submitting pricing.
6) What's the initial BidCaster™ setup process? How do Content Providers get started?
   a) First, obtain the Content Provider's list of Bidders in digital format.
      i) It must have CSI code(s) information listed for each company. At a minimum, major CSI code divisions need to be assigned to each company.
      ii) It must have a company name, contact and fax number for each company.
   b) Your ARC reprographer will correctly format the list and upload it into BidCaster™.
   c) Your ARC reprographer will request a copy of the Content Provider's company logo in digital format (jpg, gif, or pgn files are acceptable).
   d) The initial ITB message broadcasted will be by fax reflecting a request for email addresses from all Bidders.
   e) Bidders can contact your ARC reprographer with email address information and enter it into a Content Provider's Bidder List at no charge.
7) What other ITB products compete with BidCaster™?
   a) Bid Fax
   b) WinFax
   c) iSqFt
8) Is BidCaster™ SSL protected?
   a) Yes, but only where sensitive, confidential information is involved such as Credit Card or financial information.
   b) Note: Because SSL128 Bit encryption typically slows down applications approx. 30%, we use it judiciously.
9) How many Bidders typically have email capability?
   a) According to a 2002 American Subcontractor Association survey of members, over 85% are currently using email daily.
   b) According to an AGC member survey a few years ago, over 82% employed email in every day business activities.

10) Statistically, how many emails or faxes fail during transmission?
    a) Although emails are typically very reliable, approx. 1 in 100 emails fail per recent statistics. When an email fails to transmit, BidCaster™ provides a red highlighted "Error" signal to Content Providers to investigate, make a repair and re-send.
    b) Faxes are statistically higher and vary dramatically. When a fax fails to transmit, BidCaster™ provides a red highlighted "Error" signal to Content Providers to investigate, make a repair and re-send.
11) Can BidCaster™ tell when an Email is received by Bidders?
    a) No. Today's technology does not allow web-based services to do so. Only when Bidders click on a link inside emails can BidCaster™ track if it has been received.
12) Can BidCaster™ tell when an Email has been received and opened?
    a) Yes, when Bidders open their emailed broadcast ITB messages.
    b) Yes, when Bidders submit online Bid Acknowledgements.
13) Can uploaded Bidder Lists be exported?
    a) Yes. This can be accomplished within the "My Files" area located within the "My Accounts" tab. Content Providers find BidCaster™ a very effective tool to dynamically maintain the latest changes to Bidder information that can be exported as an excel spreadsheet file, for use, for example, by the accounting program.
14) Can Favorites be exported?
    a) Yes. This can be accomplished within the "My Files" area located within the "My Accounts" tab.

Marketing Information
The following is information pertaining to BidCaster for your possible marketing use.

Welcome to BidCaster!
BidCaster has been integrated into PlanWell and upgraded with new, powerful features. The objective of this user guide is to provide instructions regarding product use and as a detailed reference.

An Industry Changing Service
The combined concept represented by BidCaster™ and PlanWell® is rapidly emerging as an industry standard. Virtually all online planrooms, certainly those operated by reprographers, are rapidly adopting an integrated invitation-to-bid module such as BidCaster™ with an online planroom like PlanWell®. Its remarkable time and cost benefits typically point towards keen interest by all who witness a presentation.

Overview - New Features & Benefits
In addition to BidCaster's existing powerful features, here is a list of new and powerful enhancements:

2. Integration with PlanWell.
    a. BidCaster is now integrated inside PlanWell as one program.
    b. They now share the same Address Book (formerly defined as a Bidders List).
    c. BidCaster's broadcast process is significantly streamlined.
    d. BidCaster is faster….rewritten using the latest programming technology.
3. Assign Print Orders. General contractors may now define individual prints orders (including delivery) for various Bidders which are automatically placed once Bidders submit an online YES bid acknowledgment through BidCaster.
    a. Print-on-demand now represents significant savings for Users.
    b. Saves significant time and effort through automatic print order and delivery.

   BidCaster is the only ITB product that offers this unique and powerful feature which we believe will rapidly become an industry standard.
4. Search Address Books now by Area Code.
5. Custom CSI phase codes and descriptions can now be used.
6. Use of a single ITB broadcast template for increased simplicity.
7. Auto-Reminder Notices sent to Bidders are now customizable in same manner as Broadcast and Response templates.
8. Add additional Bidders to an existing Broadcast Status Report via subsequent broadcast.
9. Interrupted broadcasts are now saved as "Incomplete Broadcasts" with no data lost.
10. A Planholder's List is automatically saved as a Group for immediate use in a broadcast.
11. Easier data exchange with third party programs.
    a. Easier to push-pull data through use of a mapping wizard.
    b. More data is now imported and exported.
12. Easier Editing of Templates. Our new HTML Editor allows:
    a. Pasting directly from Microsoft Word.
    b. Easier creation and editing of templates similar to Microsoft Word.
13. Significantly faster faxing with increased reliability.
14. Fax attachment files are now automatically converted before sending out with broadcasts.
15. Private Notes are now a viewable inside a Broadcast Status Report.
16. Various Data Fields can be turned on or off inside the Broadcast Status Report.
17. Deleted default templates can now be restored.
18. Online time out duration has been increased from 60 to 90 minutes.
19. Broadcast Status Reports can be customized to display or hide desired data fields.

Marketing Information

A. Key Features

- Key Feature: For the first time, when sending out invitations-to-bid by email – complete plans, specs and addenda are simultaneously distributed digitally, free-of-charge, to all Bidders.
- ITBs can also be faxed simultaneously to Bidders.
- BidCaster™ is a completely free service to Bidders who receive invitation-to-bids.
- BidCaster™ integrates the invitation-to-bid process with PlanWell, the world's largest online planroom backed by American Reprographics Company, the nation's largest reprographer.
- No registration is required as PlanWell is a freely accessible online "store".
- No special software is required as it is browser based – just use latest versions of Microsoft Internet Explorer, Netscape or AOL.
- Bidders simply read customizable ITB (invitation-to-bid) messages, complete with company logos embedded, then click on a link to immediately view plans or use Acrobat Reader to read a complete spec book online.
- No typing or memorization is required since emails are encrypted with necessary ID and Password information.
- Bidders then submit a Yes or No bid acknowledgement which is tracked inside BidCaster™for private viewing and printing by the Content Provider (typically a general contractor).
- Additionally, PlanWell automatically tracks all plans or specifications purchased in a private Planholder's List.

B. Key Benefits

- Free to invited Bidders – Allows immediate use by all Bidders.
- Simple to Use by Bidders – Point and click process and No IDs or Passwords are needed to immediately view Plans, Specifications or Addenda. No typing required.
- No special software required by Bidders – It's all browser based.
- Eliminates Travel to Pick up and Drop off Plans – Bidders can evaluate projects now from the comfort of their office…or at home, 24/7.
- 25 to 75% of in-house ITB labor saved – Does in 15 minutes what typically takes hours or days.
- Print on Demand – Print only when Bidders acknowledge "Yes" they will submit a bid. Avoids traditional "shotgun" cost of prints to all Bidders.
- Lowers Bid Document distribution labor – Again, does in less than 60 minutes what typically takes days. BidCaster™ digitally "pushes" complete bid documents out to all Bidders with each ITB.
- Immediate Document Distribution – Digitally distributes Bid Set Documents and Addenda by email within minutes of each broadcast launch.
- Represents an Unfair Competitive Advantage since increased competition wins more bids – Invite significant additional numbers of Bidders with less effort to increase your odds of being low.
- Lowers Risk – Eliminate "busts" in bids by distributing 100% to all Bidders, 24/7/365. Bids received are quality bids since Bidders receive complete information, all the time, every time.

- BidCaster™ costs can become a reimbursable expense – On negotiated projects, costs can now be passed onto the architect and owner for payment. Ask GCs what percentage of work do they negotiate? Most will say it's between 30 to 90%.
- Control the Pace – Allows Estimators to slow down the pace and focus to exercise better judgment.
- Lowers Project Costs – Makes for happier Owners and increases odds for repeat business.
- More Efficient – What is benefit to bidding more projects per month? Increased bottom line profits.
- Bidders need not drive across town to pick up and drop off plans at a general contractor's office – thus saving the related time and expense.
- Simple to Use by General Contractors – Takes hours, not days to learn.
- Pain Relief – Eliminate ongoing stress due to this messy, time consuming process that must be done with accuracy, thoroughness and dispatch each time.
- The end result: BidCaster™ and PlanWell becomes a very effective and economical Project Assistant that works 24/7.

C. Cost

Please contact your regional BidCaster™ Provider for pricing applicable in your area.

[End of User Guide]